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ABSTRACT

To examine older workers' general values toward work and their specific motivations when seeking a new job, a sample of 198 people aged 50 or older who had recently begun a new job were interviewed by telephone. A follow-up interview was conducted 4 months later (n=182). Regarding general work values, respondents ranked "feeling a sense of accomplishment" as their highest priority. Factor analysis of 16 work value items yielded 5 factors: material benefits, mental stimulation, job compatibility, flexibility, and social environment. The most important motivational value during pursuit of the new job was the desire to feel useful. Factor analysis of motivational items yielded two factors: material benefits/security and personal development/social. The follow-up interview revealed 75 percent of respondents were still at the same job. Being able to use previously developed skills, seeing the impact of one's work on the final product, having the freedom to decide what to do on the job, and not being too closely supervised all related to job persistence and work satisfaction among older workers. Stepwise multiple regression analysis revealed gender was the important predictor of persistence on the job, with women persisting more than men; worker independence was the most important predictor of job satisfaction and ability to use previously developed skills and abilities on the new job was the most important predictor of "fit" between job sought and job located. A major recommendation resulting from this research is for hirers to pay attention to the intrinsic (non-material) benefits of work as well as to the extrinsic (material) gains. Older workers are seeking a challenge and a sense of accomplishment. (Appendixes include 29 references, older worker referral materials, and interview schedules and instruments.) (YLB)

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Human Services Development Institute

# PREDICTORS OF SUCCESS AMONG OLDER WORKERS IN NEW JOBS

## FINAL REPORT

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# PREDICTORS OF SUCCESS AMONG OLDER WORKERS IN NEW JOBS

## FINAL REPORT

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Michael Brady
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# PREDICTORS OF SUCCESS AMONG OLDER WORKERS IN NEW JOBS

## EXECUTIVE SUMMARY

This study examined work values, motivations, and successful job placements among older workers in Maine and Connecticut. One hundred ninety-eight (198) workers aged 50 or older who began new jobs on or after January 1, 1988 were interviewed by telephone to determine the nature of their general work values and specific job search motivations. A follow-up interview was conducted four months later to determine job persistence, work satisfaction, and the quality of the match between the job sought and that which was actually obtained by the older worker.

The median age of the sample was 62 years with a range of age from 50 to 83. More than one-third (37 percent) of the sample was at least 65 years of age and nearly two-thirds (62 percent) were female. Most (81 percent) were Caucasian. The average older employee worked 26 hours per week.

While older workers expected material benefits from their jobs (i.e., good wages, fringe benefits, medical insurance), results from this study indicate that they also placed a high value on non-material aspects of work. In fact, being able to feel a sense of accomplishment on the job and having friendly co-workers in the workplace ranked higher than material benefits in the general job value ratings among older workers.

Women were found to report more interest in material benefits from work than men in the research sample. For example, 71 percent of the women in this sample reported that additional income from work is "very important" to them as compared with 37 percent of men. Workers in their 50's were more interested

in material benefits than those in their early 60's, while the group of respondents aged 65 or older also reported that material rewards were very important. As might be expected, older workers with less income and less education valued material benefits more than their better-educated, wealthier counterparts.

The follow-up interview revealed that 75 percent of respondents (N=182) were still at the same job. Women persisted on the job and reported greater general job satisfaction than men. Those who were able to use skills and abilities developed in previous jobs and who saw the impact of their work on the product or service produced were more likely to remain on the job. Workers who reported not being closely supervised on the job had higher levels of work satisfaction than those who were being closely supervised. In addition, being able to decide how to get the job done was a recurrent factor in job placement success. Therefore, both freedom and continuity of skill are clearly important themes of job success among older workers interviewed in this study.

A major recommendation from this research is for job placement agencies, employment counselors, and supervisors to pay attention to the non-material (or "intrinsic") benefits of work as well as the material ones. Persons over the age of 50 are seeking a sense of accomplishment and a challenge in the workplace. Businesses and organizations which are not sensitive to the intrinsic benefits offered in a job will not provide the environments in which older workers persist and find work satisfaction.

# PREDICTORS OF SUCCESS AMONG OLDER WORKERS IN NEW JOBS

## ABSTRACT

Little is known about the process of seeking new jobs in middle and later life. In order to examine older workers' general values toward work and their specific motivations when seeking a new job, a sample of 198 people aged 50 or older who recently began a new job were interviewed by telephone. The sample was recruited from Senior Community Service Employment Programs (SCSEP), state job service agencies, Job Training and Partnership Act (JTPA) programs, senior job banks, and private industry in Maine and Connecticut. A follow-up interview was conducted four months later (N=182) to determine job persistence, work satisfaction, and the quality of the match between the job sought and the job obtained.

The median age of the sample was 62 years with a range of age from 50 to 83. More than one-third (37 percent) of the sample was at least 65 years of age and nearly two-thirds (62 percent) were female. Most (81 percent) were Caucasian. The average older employee worked 26 hours per week.

Regarding general work values, respondents ranked "feeling a sense of accomplishment" as their highest priority, followed by "having friendly co-workers" and "interesting work." Factor analyses run on 16 work value items yielded five factors: material benefits, mental stimulation, job compatibility, flexibility, and social environment.

The most important motivational value during the pursuit of the new job was reported to be the desire to feel useful, followed by earning additional income and meeting new people. Factor analysis run on motivational items

yielded two factors: material benefits/security (extrinsic) and personal development/social (intrinsic).

Study findings revealed that women in the sample were more interested in material benefits from work than men. In addition, respondents with lower incomes and lower levels of education rated material benefits higher than those with higher incomes and levels of education. These differences between groups were statistically significant at or below the .05 level. A curvilinear relationship was found between age and material work values, whereby workers in their 50's and those over the age of 65 tended to rate material benefits of higher importance than workers aged 60-64.

The follow-up interview revealed that 75 percent of respondents were still at the same job. Being able to use previously developed skills, seeing the impact of one's work on the final product, having the freedom to decide what to do on the job, and not being too closely supervised all related to job persistence and work satisfaction among older workers. In effect, these are very important predictors of success at a new job in middle and later life.

Stepwise multiple regression analysis revealed that gender was the most important predictor of persistence on the job (women persisted more than men). The most important predictor of job satisfaction was worker independence. The most important predictor of "fit" between the job sought and the one actually located was the ability to use skills and abilities on the new job that were developed earlier in the older worker's career.

A major recommendation from this research is for job placement agencies, employment counselors, and supervisors to pay attention to the non-material ("intrinsic") benefits of work as well as the material ("extrinsic") ones. Persons on the job market in middle and later life are seeking a sense of accomplishment and a challenge in the workplace. This study also suggests that women tend to be more interested than men in extrinsic rewards of work in middle and later life, due to unique circumstances which lead them to seek work. Businesses and organizations which are not sensitive to the intrinsic benefits offered in a job, and to different needs of older men and women, will not provide the environments in which older workers persist and find work satisfaction.

# I. INTRODUCTION AND BACKGROUND

## A. Project Objectives

Given the steadily increasing numbers of older persons in today's labor market and projections for future growth in older worker participation in the labor force (McLaughlin, 1988), more information is needed to understand older workers' definitions of "successful work." This research investigated the meaning of job success among workers aged 50 and above placed in new jobs after January 1, 1988 in two New England states, Connecticut and Maine.

The major purpose of this research was to investigate, from the perspective of the older worker her/himself, general work values, specific motivations for seeking a job, and persistence and satisfaction in new jobs. Specifically, the research attempted to answer four major questions:

(1) What constitutes job success from the perspective of the older worker?

(2) How do older workers' definitions of a successful job vary according to demographic and socioeconomic characteristics and prior work history?

(3) What job characteristics are related to successful and unsuccessful job placements among older workers?

(4) How do older worker and job characteristics interact to shape successful and unsuccessful placements?

## B. Work in Middle and Later Life: Project Perspectives

Few social trends in the twentieth century have been as distinct, consistent, and significant as the decline in labor force participation among older male Americans. At the turn of the century, men reaching the age of 65 could expect to work well beyond the age generally accepted as the retirement years. In fact, over two-thirds of the men living to age 65 remained in the labor force. By 1950, that figure had dropped to less than one-half. Today, male labor force participation for those age 65 and over hovers at about 20 percent (Ward, 1984; Doering et al, 1983).

Trends among women have been less distinct. Labor force participation rates among older women have always been low as compared with men. Today, just over eight percent of all females remain in the labor force past age 65. However, the labor force participation rate of younger women has been growing since 1955. Current work trends among young and middle aged women represent another significant change this century in the American labor force, and suggest that they will remain in the work force for longer periods of time (Kingston, 1982; Davidson, 1982).

More recent demographic and labor market changes, however, have led to projections that older workers will play an increasingly significant role in the U. S. labor force in the 1990's and beyond. Recent economic expansion, coupled with substantial declines in the number of younger workers entering the labor force, have begun to influence employers to both retain their current older workers (i.e., scale back on "golden parachutes" and other incentives for early retirement) and actually recruit elders into the workforce (Clark, 1988; McLaughlin, 1989).

Despite these recent trends and projections, the days of employment policies that discriminate against the older worker are not completely over. Individuals in later years who wish to continue working often face numerous barriers to continued employment. In a recently published article, Brady et al (1987) reported that numerous barriers existed for older persons who wanted to work. These consist of barriers associated with the actual lives and situations of the older worker (i.e., health status, family care responsibilities) as well as with the workplace itself.

Very little research has been conducted on the actual job seeking process of older persons. Pursell and Torrence (1980) studied job searches and re-employment of females seeking unemployment insurance. Older women (age 45 and over) completed a significantly different job search from that of younger women. More specifically, older women were more likely to apply directly to employers for jobs, as compared with younger women who more frequently sought out job counseling, testing and placement services, collegial networks, state employment services, and other conduits to employment. Daniel and Knowles (1984) reported that older workers, once laid off, took nearly twice as long to get back into the work force as younger people. Many older workers, once unemployed, eventually give up and become involuntarily retired.

There is strong evidence in the literature that overall job satisfaction is positively associated with age; that is, older employees in general report greater satisfaction with their jobs than do younger employees. While one earlier study reported a U-shaped relationship (Herzberg et al, 1957), more recent studies have reported a linear relationship between age and satisfaction. This positive linear relationship between age and satisfaction appears to hold at least up to age 60. However, there is conflicting evidence, along with limited information, for the period after age 60 (Hunt and Saul, 1975; Weaver, 1978). One study found that workers aged 65 or over reported higher levels of satisfaction than any other age group (Stains and Quinn, 1979).

What constitutes job success among older workers in new jobs is an unexamined issue. The demographic and socioeconomic characteristics of the employee and the specific nature of the job characteristics themselves as valued by older workers have not been heretofore examined. This research advances knowledge in these important areas and, consequently, will serve both older individuals and those who are working on their behalf in the applied gerontology and human service arenas.

### C. Organization of This Report

The next major section of this report details the methodology used to meet the project objectives. This includes approaches to sample recruitment, data collection, variable definition, and data processing. The section concludes with a comparative profile of Maine (N=100) and Connecticut (N=98) subsamples interviewed in this study.

Section III presents findings related to the four major research questions addressed in this study. Based on results, Section IV draws conclusions and outlines recommendations for program practitioners who assist older persons in finding work, and for gerontological researchers interested in the dynamics of work values and job seeking in middle and later life.

## II. PROJECT METHODOLOGY

This portion of the report describes how older worker samples were obtained in Maine and Connecticut, summarizes data collection instruments and procedures, presents operational definitions for the variables used in data analyses, and describes the background characteristics of older workers recruited in both states.

### A. Sample Recruitment

For purposes of this research, older workers in new jobs were defined as persons aged 50 or older who began new employment on or after January 1, 1988. In order to maximize the diversity of older workers in this study, four major referral sources for older workers were used in both Maine and Connecticut: (1) Senior Community Service Employment Programs (SCSEP); (2) Job Training Partnership Act (JTPA) Programs; (3) Job Service Programs located at Bureaus of Employment Security and Area Agencies on Aging; and (4) private companies. Persons recruited through the SCSEP and JTPA programs had been provided with assessment and skills training as part of the placement process into new jobs, while persons located through private companies had sought those jobs without formal training and placement programs. Finally, some persons recruited through Job Service Programs had received employment counseling and assessments while others had used job listing services only. The remainder of this section summarizes sample recruitment experiences in Maine and Connecticut separately.

1. Maine: A total of 100 older workers were recruited in Maine. Numerous materials were developed to facilitate the referral of older workers

into the project (see Appendix 1), and project staff attended meetings of SCSEP, JTPA, and Job Service program officials in the early months of the project to explain the purposes of the study and specify referral protocols. Project staff also attended the annual Older Worker Job Fair in Portland to meet employers and prospective older workers. Frequent contact was maintained with all referral sources throughout the eight month recruitment period through brief project updates (Appendix 2).

As a result of these procedures, the final Maine sample included eight percent of older workers from SCSEP programs, five percent from JTPA programs, 35 percent from Job Service programs, and 52 percent from private companies. The primary reason for lower-than-expected numbers from the training and placement programs was the unusually strong labor market situation in Maine during 1988. Older persons seeking work were less in need of placement programs than was originally anticipated because of the relative abundance of job opportunities. Therefore, SCSEP and JTPA programs had fewer participants in 1988 than in previous years.

2. Connecticut: The goal for the Connecticut sample was one hundred older workers who had recently started new jobs. In order to achieve this goal, the University of Hartford staff in March 1988 sent materials to thirty-three agencies (identified by the State Department on Aging) which participated in federally-funded employment training programs for older adults. An introductory letter described the project and its aims and requested the cooperation of agents. In the interest of maximizing participation, a letter from the State Commissioner on Aging endorsing the

study was included. Each set of materials included a narrative of the study which the referral agent was instructed to share with potential clients. The set also included a referral form, which when completed provided information on each client's job, employer, referral agency, work hours, and desired times and days for the interview. The instructions indicated that qualified participants were those persons aged 55 and over, working at least 10 hours each week, who had begun their job on or since January 1, 1988. This set of materials also contained an informed consent form to be completed by the participant and a return envelope. Copies of these materials are found in Appendix 1. Following this initial mailing, staff placed telephone calls to each agency verifying receipt of the materials. At this time, project staff learned that seven of the agencies were unwilling or unable to participate. In April, follow-up calls continued, and a number of job banks were contacted and referral materials were sent to them.

In early May, letters were sent to the thirty interested agents, informing them that the age qualification now included workers aged 50 and over. The change was necessitated by the difficulty in securing enough referrals aged 55 and over to achieve our target sample.

Additionally, in order to increase the number of referrals, shorter referral forms were mailed to all agencies. The short form reduced the amount of information which was to be gathered by the referral agent. Telephone calls were made to insure that the new referral forms were received and understood by the various agents.

In June, efforts were made to include privately funded participants, and staff met with representatives of six local financial institutions known to have employment programs for older workers. One of the six companies agreed to make referrals of interested older workers. In addition, contact was established with the Connecticut Department of Labor which links employers and job seekers through a network of local agencies known as Connecticut Job Services. Two offices ultimately provided referrals.

Beginning in July, personal visits were made to thirteen agencies in eleven cities and towns around the state in order to increase the number of referrals. The bulk of referrals, in fact, was received between July and October. In the end, a total of 133 referrals was finally received. Of these, 35 were disqualified either because they had worked too long before the referral was made, were no longer working when contacted, or had changed their mind about participating in the interview. Consequently, 98 interviews were completed with older workers beginning new jobs of at least 10 hours per week.

This sample was not evenly distributed across referral agency or funding sources; 24 percent of participants were referred by JTPA programs, 28 percent by SCSEP, 43 percent by private sources, and five percent were referred through Connecticut Job Services.

### B. Data Collection Instruments and Procedures

The research design called for two (2) telephone interviews with each older worker during the course of the study. The initial interviews (T1) were conducted as soon as possible after the older workers began their new jobs, while the follow-up interviews (T2) were conducted four (4) months thereafter. Since the project accepted persons who began a new job in 1988, the time between when they started working and when they were referred to the project team varied considerably. The actual length of time between the start date for working and the T1 interview ranged from the same day to 298 days. The median was 70 days, and there was no significant difference between Maine and Connecticut samples in average length of time. This variable was entered as a control variable in multivariate analyses predicting job placement success.

1. Instrumentation: Both the T1 and T2 interview schedules were developed by the project team at the University of Southern Maine (USM), with assistance from the subcontractors at the University of Hartford (UH). These instruments were pretested in Maine to clarify items before final versions were produced.

The primary objectives of the T1 interview were: to collect demographic and socioeconomic data from sample members; to obtain information about their work histories; and to determine their views on important factors related to employment in general, as well as to their job search that resulted in their new positions. These latter items were used to construct various measures of "job success," as is detailed in Section C below.

In the T2 interview, the primary objectives were: to determine whether sample members were still employed in the jobs that resulted in their inclusion in this study, and to ascertain their experiences with the new jobs.

The average length of the T1 interview was 25 minutes and the average length of the T2 interview was 15 minutes. Copies of these two instruments are included with this report as Appendix 3.

2. Interviewer Training: Project staff at USM designed all training materials for interviewers in Maine and Connecticut. For T1 interview training, a member of the USM project staff traveled to UH to train Connecticut interviewers at the Sociology Department's Institute for Social Research. Training materials for T2 interviews were mailed to UH and reviewed via telephone with USM staff.

Training materials for this project included a self-instructional workbook and audiotape on general interviewing and telephone survey techniques from the University of Michigan's Survey Research Center, as well as question-by-question objectives specific to both interview schedules for this project. Copies of the Instrument and Interviewer Instructions used for the T1 and T2 training sessions are included as Appendix 4.

In Connecticut, both interviews were translated into Spanish in order to accommodate Spanish-speaking participants. In these cases, interviews were conducted by a bilingual interviewer.

3. Data Editing, Coding, and Processing: All completed interviews from older workers in Connecticut were mailed by UH staff to project headquarters at USM. Since these instruments were pre-coded, UH staff coded all closed-ended items before mailing originals (copies were maintained at UH). Check coding was done at USM, and discrepancies were resolved by telephone with UH interviewers.

Interviews in Maine were conducted via a Computer Assisted Telephone Interview (CATI) system located at USM. This system allows interviewers to read questions as they appear on a computer terminal and directly enter responses, either in coded or narrative form. Pre-programming valid codes enables simultaneous editing of responses, and results are transferred to a diskette. Thus, the CATI system merges the coding, editing, and initial data processing steps. Data from completed interviews received from UH were also entered into the CATI system and transferred to diskette.

Data from diskettes were then uploaded into the IBM mainframe computer at USM. The Statistical Analysis System (SAS) was used for all data modification and analysis procedures.

## C. Variable Definitions

1. Dependent Variables: This section describes how the concepts of "job success" and "successful job placements" were operationalized in this project.

Job Success refers here to older persons' work values and motivations regarding employment at the time they seek or begin a new job after age 50. From the perspective of newly hired older workers, "job success" is defined according to job characteristics that are considered more or less important. The rationale here is that individual older workers have notions of a successful job in their minds, which can be understood by their self-reports about what is important in any job (global notions of job success) and by their self-reports about what was important when they began their search for employment after age 50 (immediate expectations of job success). Thus, job success is conceptualized in terms of work values (global notions) and motivations (immediate expectations). To the extent that these expressed work values and motivations are actually present in a new job, it can be assumed that the job is "successful" from their viewpoint. The first two research questions in this study ask: (1) What constitutes job success from the perspective of the newly hired older worker? and (2) How do definitions of job success vary according to demographic, socioeconomic, and prior employment characteristics?

The initial (T1) interview schedule included questions which allowed the concepts of work values and motivations to be operationalized. Work values were measured by having respondents state how important a list of job characteristics was in any job, not just their present job. Items ranged from job security to opportunities for promotion or advancement, and responses ranged from "very important" to "not at all important." (See T1 Interview, Appendix 3, Questions 3a-3q.) This list of items was subjected to a factor analysis in order to identify underlying dimensions in the data. A total of five (5) factors were identified, which are used as major dependent variables to answer the first two research questions. Individual items which comprise these factors are also summarized in the findings section of this report, when their use helps to clarify understanding of patterns in the data.

Motivations were measured by asking respondents how important specific items were "when you started your search for employment" (Questions 5a-5g). These seven items were subjected to factor analysis, and two (2) factors emerged. These factors are also used as major dependent variables to address the first two research questions, and individual items are used to supplement major findings.

Successful job placement refers to actual experiences while in the new job, and is the key concept in Research Questions 3 and 4. Dependent variables representing measures of this concept were derived from responses to the T2 interview schedule. The primary measure is whether or not respondents were still employed at the same job four months after the T1 interview (Q3, a dichotomous variable). Other measures used to define "successful job placement" include reported overall level of satisfaction with the new job (Q12) and how close the job was to what respondents were looking for (Q27). These are ordinal variables, and serve to refine the concept of successful job placements among older workers.

Results of analyses based on these dependent variables are presented in Section III of this report.

2. Independent Variables: These can best be summarized according to whether they represent demographic, socioeconomic, prior work history, or current job characteristics. Demographic and socioeconomic variables were used in analyses to answer Research Questions 2 and 4, prior work history variables were also used to answer Research Questions 2 and 4, and current (new) job characteristics were used to answer Questions 3 and 4.

- Demographic variables included: age, gender, ethnicity, and living arrangements (alone, with spouse only, with spouse and others, with others only).
- Socioeconomic variables included: household income, level of education and health status.
- Prior work history variables included: major occupational category of "main career job," number of years employed in main career occupation, source of referral to the new job, and factors based on items specific to the main career job. (See Q24a-24g in the T1 instrument).

- Current (new) job characteristics included: factors based on items specific to the new job, (see Q17a-17h in the T2 instrument), and major occupational category of new job.

## D. Profile of Older Worker Sample

A total of 198 older persons (aged 50 or over) who began a new job between January and September 1988 were included in the research sample based on the methods outlined above. The total included 100 persons from Maine and 98 from Connecticut. This section compares these two state subsamples in order to show the diversity of older workers interviewed for this study.

Table 1 summarizes sociodemographic characteristics of the Maine and Connecticut subsamples. Results clearly indicate differences between the two groups along several variables. Looking first at age distributions, Maine's older workers had a mean age of about 61 years at the time of the initial interview, compared to a mean of almost 64 years in the Connecticut group. The age range was much greater in the Connecticut group as well. Not shown in Table 1 is the finding that 47 percent of the Connecticut sample was aged 65 or older, compared to 28 percent in Maine ($p = .02$).

Although there were age differences, no gender differences were found, with both states showing a female:male ratio of about 3:2. Maine sample members were more likely to be married than their counterparts in Connecticut (see Table 1), although identical percentages in both states lived alone (32 percent).

Turning to ethnic and socioeconomic characteristics, Table 1 shows that Connecticut respondents were much more likely to be nonwhite (particularly Black--22 percent), much less likely to have completed high school, and have

## TABLE 1

## SOCIODEMOGRAPHIC CHARACTERISTICS OF THE OLDER WORKER SAMPLE BY STATE, BY PERCENT

| Characteristic | Maine (N=100) | Connecticut (N=98) | Significance Level |
|---|---|---|---|
| Mean age | 60.9 | 63.6 | .001 |
| Age range | 50-73 | 51-83 | ---- |
| Percent female | 63.0 | 61.2 | N.S. |
| Percent married | 45.0 | 31.6 | .08 |
| Percent nonwhite | 2.0 | 36.0 | -.001 |
| Less than high school education | 18.0 | 39.8 | .003 |
| Percent $20,000 or less household income | 40.0 | 55.1 | .03 |

considerably lower household incomes. In Connecticut's subsample, 20 percent reported household incomes of $10,000 or less, compared to only seven percent in Maine.

This comparative profile allows the conclusion that the Maine subsample represents a slightly younger and more well-to-do population of persons in middle and later life who are seeking new jobs. When the two subsamples are combined, they represent quite a diverse population of older job seekers, including minorities.

Since in this report the primary interest is understanding older workers' self-definitions of job success and successful job experiences, as well as what variables may affect these "outcomes," the two state subsamples are combined. Future reports based on this sample will more fully explore cross-state differences and their possible causes.

# III. FINDINGS

This portion of the report is organized according to the four major research questions addressed by this study.

## A. RESEARCH QUESTION #1: What constitutes job success among older workers?

Individual notions of successful jobs and successful job placements are reflected by both attitudes and behaviors. This research adopts the perspective that these indicators of job success are integrated into a "social action" approach which views success as a function of both (1) the objective nature of the jobs that workers fill, and (2) the subjective interpretations of job characteristics and motivation of the worker (Kalleberg, 1977; Bokemeier and Lacy, 1987). The objective component will be examined later, as part of Research Questions 3 and 4.

The second, or "subjective," factor has two components, work values and motivation. *Work values* refer to the relative importance assigned to the various aspects of work by the individual. Workers may differ considerably in what they consider desirable. While some workers stress factors "intrinsic" to the work tasks themselves, like challenging work, other workers stress factors which are "extrinsic," such as pay (Kalleberg 1977). The second "subjective" component is *motivation*, which refers more directly to what keeps a worker going in a job, or what guides him or her in looking for a new job.

1. *Work Values*: Research Question #1 addresses the subjective factor of job success by having the sample of older workers respond to specific questions regarding work values and motivation. First, to measure work

values, respondents were asked to assess the importance of 16 job characteristics: "For each one I'd like you to tell me how important it is in any job." Fixed choices ranged from "very important" to "not important at all."

Results indicate that having a sense of accomplishment was the most important work value expressed by the research sample. Of the total sample of 198 older workers, 197 reported that having a sense of accomplishment was either "very important" (85.9%) or "somewhat important" (13.1%). Responses to an open-ended question following the fixed choices helped to elucidate the meaning of this characteristic. One worker spoke of gaining "psychic income from doing a job well and seeing the results." Another spoke of the satisfaction of "doing a job well and counting within the company."

The next most important work value was having friendly co-workers. Nearly 82% of the sample (N=163) reported that this was "very important" to them in a job. This characteristic was followed by the work itself being interesting and the nature/mission of the company in the rank ordering of general job success characteristics. Table 2 shows the rank ordering of the sixteen work value variables, with means calculated by assigning a value of 1 to the "very important" response, a 4 to the "not at all important" response, and a 2 or 3 to the intermediate responses.

An open-ended question asked at the end of the 16 fixed choice items was intended to elicit additional characteristics which the older workers believed to be important to job success (i.e., important work values). Responses to this question provide both new ideas and a corroboration of items already listed. A new idea not specifically addressed in the 16 work value factors

## TABLE 2

## RANK ORDERING OF WORK VALUES EXPRESSED BY OLDER WORKERS (N=198)*

| Characteristic | Rank | Mean |
|---|---|---|
| Sense of Accomplishment | 1 | 1.15 |
| Friendly Co-workers | 2 | 1.20 |
| Work is Interesting | 3 | 1.22 |
| Nature/Mission of Company | 4 | 1.33 |
| Learn New Things | 5 | 1.33 |
| Comfortable Work Conditions | 6 | 1.35 |
| Job Security | 7 | 1.42 |
| Good Wages | 8 | 1.46 |
| Job Location | 9 | 1.49 |
| Medical Insurance | 10 | 1.49 |
| Independent Decisions | 11 | 1.50 |
| Flexibility | 12 | 1.58 |
| Fringe Benefits | 13 | 1.59 |
| Use Acquired Skills | 14 | 1.64 |
| Opportunity for Advancement | 15 | 1.91 |
| Supervisor Close to Own Age | 16 | 2.86 |

*Scale:
1 = item is very important
2 = item is somewhat important
3 = item is not very important
4 = item is not at all important

was that of being trusted and respected at work. One older worker expressed this idea by saying "the attention that others give you when you ask a question" is important. Another manifestation of this concern for trust and respect is reflected in the following statement: "I would not want to be asked to do anything which goes against my moral judgment." Others spoke of having a boss who is sensitive and not quick to be critical of mistakes and of feeling valued "as a new worker by being reviewed early."

This notion of feeling respected on the job relates to another idea expressed as an expansion of our list of 16 items. People believe it is important that they be treated "like a human being" rather than merely an employee. "Having a boss you can deal with as a person instead of as an employer" was one respondent's statement. Being treated honestly is an important ingredient in being treated as a human being at work. "Honesty in management" and "honest praise and criticism" were expressed as important for job success by several newly hired older workers.

A factor analysis was conducted to determine how the 16 work value statements grouped together as factors in the research sample. Five factors emerged from this analysis. What we have entitled "Material Benefits" is comprised of items such as job security, wages, medical insurance, and fringe benefits. "Mental Stimulation" includes learning new things, having a sense of accomplishment, and the ability to make independent decisions. "Job Compatibility" incorporates the use of acquired skills, job location, and comfortable working conditions. "Flexibility" is comprised of the work being interesting and having flexibility on the job, and "Social Environment" involves having friendly co-workers. A summary of this factor analysis is shown in Table 3.

Results indicate that newly hired older workers express similar work values as those reported by younger workers in other research. In particular, the clear separation between an "extrinsic" factor (material benefits) and "intrinsic" factors such as mental stimulation and flexibility is consistent with findings from investigations of younger individuals in the work force (Kalleberg, 1977; Mottaz, 1985).

## TABLE 3

## SUMMARY OF FACTOR ANALYSIS OF WORK VALUES EXPRESSED BY OLDER WORKERS (N=198)*

| Factor 1<br>Material Benefits | Factor 2<br>Mental Stimulation | Factor 3<br>Job Compatibility | Factor 4<br>Flexibility | Factor 5<br>Social Environment |
|---|---|---|---|---|
| Job Security (.733) | Learn New Things (.628) | Acquired Skills (.517) | Interesting Work (.601) | Friendly Co-workers (.808) |
| Good Wages (.712) | Independent Decisions (.586) | Job Location (.543) | Flexibility (.747) | |
| Medical Insurance (.780) | Sense of Accomplishment (.728) | Comfortable Working Conditions (.678) | | |
| Fringe Benefits (.798) | | | | |

* Items were included in a factor if their coefficient loaded at .5 or higher. See Table 2 for scaling of each item.

2. Motivation: Respondents were then asked to make judgments about the importance of job characteristics related to the specific job search they had just completed. Older workers were asked to respond to each of seven characteristics, rating them as very important, somewhat important, not very important, or not at all important, when they started their recent search for employment. This question tapped the motivations influencing older workers as they searched for new jobs in middle or later life.

Findings revealed that the need to feel useful was the most important factor in the older workers' recent job search. Ninety-four percent of the sample (N=187) reported feeling useful to be either very important or somewhat important in their recent search for work. Several people further developed this idea in the open-ended question following the list of items. One said that she "wanted to help others" in any work she took on at this stage in her life. Another wanted to feel that he was using the experience he had built up through his already long career; in essence, an expression of the need to feel useful to himself.

The second most important job characteristic during the recent search for employment was additional income. Nearly 93 percent of the sample believed this to have been either very important (N=115) or somewhat important (N=69). In order of importance this was followed by meeting new people and finding something that was challenging. The rank ordering of the seven variables measured in this question are shown in Table 4.

**TABLE 4**

**RANK ORDERING OF MOTIVATIONS INFLUENCING RECENT JOB SEARCH EXPRESSED BY OLDER WORKERS (N=198)***

| Characteristic | Rank | Mean |
|---|---|---|
| Desire to Feel Useful | 1 | 1.33 |
| Additional Income | 2 | 1.51 |
| Meeting People | 3 | 1.55 |
| Wanting a Challenge | 4 | 1.70 |
| Need to Do Something Different | 5 | 1.97 |
| Fringe Benefits | 6 | 2.13 |
| Medical Insurance | 7 | 2.19 |

*See Table 2 footnote for scaling of items.

A factor analysis was performed on the seven variables which measured motivations of the older workers. Two factors emerged from this analysis. What we have entitled "Material Benefits/Security" is comprised of additional income, medical insurance, and fringe benefits. "Personal Development/Social" is comprised of the need to be challenged, meeting new people at work, and being able to do something different. A summary of this factor analysis is shown in Table 5. Results again clearly reflect the distinction between intrinsic and extrinsic motivators guiding older workers in their recent job search.

TABLE 5

SUMMARY OF FACTOR ANALYSIS OF MOTIVATIONS EXPRESSED BY OLDER WORKERS (N=198) IN THEIR RECENT JOB SEARCH*

| Factor 1 Extrinsic Motivators | Factor 2 Intrinsic Motivators |
|---|---|
| Additional Income<br>(.669) | Feel Useful<br>(.658) |
| Medical Insurance<br>(.865) | Challenged<br>(.800) |
| Fringe Benefits<br>(.851) | Meeting People<br>(.666) |

* Items were included in a factor if their coefficient loaded at .5 or higher. See Table 2 footnote for scaling of items.

To summarize findings related to the first research question, this study has characterized job success perspectives among newly hired older workers both in terms of general work values and specific motivations influencing recent job searches. These perspectives tap the attitudes of persons in middle and later life in an effort to understand their own notions of important aspects of a successful job.

Different images exist concerning the work orientation of older workers, especially those who re-enter the work force or change jobs. One image views older workers as being at a point in the life-cycle where an instrumental orientation to work is not enough; instead, meaningful work becomes more salient. A second image sees older workers as primarily interested in jobs as sources of additional income and fringe benefits, especially medical insurance.

The results of Research Question #1 tend to conform to first image; that intrinsic work values and motivations are as important or more important than extrinsic ones in this sample. Thus, job success is clearly a combination of internal fulfillment and material rewards from the perspective of these older workers.

## B. RESEARCH QUESTION #2: How do definitions of successful jobs vary according to background characteristics?

This research question addresses the issue of where differences in work values and motivation come from. Explanations of such differences fall into two broad categories: "individualistic" and "structural." Those in the individualistic tradition hold that people bring different values with them to the work role, resulting from the different socializing experiences they have had (e.g., Blood and Hulin 1968). We should therefore expect work values and motivation to vary according to such variables as age, gender, and education, since these characteristics imply different socializing experiences. Those in the structural tradition argue that differences in work values and motivation are a function of the different work experiences that people have had (Gruenberg, 1980). More specifically, it is held that people adjust attitudes, needs, and expectations according to the rewards which have been available in their jobs. For example, if one's prior work contained few prospects for intrinsic gratification, he/she will attach greater importance to extrinsic rewards in future jobs. On the other hand, if previous work emphasized extrinsic rewards, work in later life may shift to a focus on intrinsic rewards.

In order to answer this research question, we employed analysis of variance (ANOVA) and T-Tests to determine whether there were differences in definitions of success across numerous demographic, socioeconomic, and prior work experience variables. The factor analyses reported above provided the source data for the dependent variables. The means of these various factors were compared to determine if individualistic variables (age, gender, education, income, household composition, and health status measures) and/or structural variables (prior work history measures) are responsible for variations found in work values and motivation. In addition to the factor scores, individual items reflecting work value and motivation were analyzed as dependent variables in order to better understand these relationships.

## 1. Individualistic Variables

### Age

It has been argued that younger people today are socialized with higher expectations concerning the intrinsic characteristics of work (e.g., a sense of accomplishment) than older workers (O'Toole, et.al., 1973). At least one study, however, suggests that different age groups do not differ much at all in their work values (Taveggia and Ross, 1978). Older workers, in fact, are often considered a homogeneous group from the viewpoint of work values and motivations. Our research is intended, at least in part, to look at differences within this group.

Results suggest that there is a curvilinear relationship between both work values and motivations in work and age in this sample. Those in their fifties have a greater degree of interest in general financial matters than workers in their sixties and early seventies. Interest in material benefits increases again among workers over the age of 75, although there are a small number of respondents in this category (N=7). Results of ANOVAs run on "Material" and "Extrinsic" are shown in Table 6, illustrating that material aspects of work values and motivations fluctuate in importance after age 50. This suggestive finding deserves greater research attention with larger samples of workers aged 75 or older.

In order to further explore relationships between age and work values, we looked at individual items reflecting work values as dependent variables. Age categories were recoded into three groups: 50-59, 60-64, and 65 and over, in order to reduce the possibility of spurious findings due to small sample sizes in the oldest age group.

## TABLE 6

### FACTOR SCORES ON "MATERIAL" WORK VALUES AND "EXTRINSIC" MOTIVATIONS IN JOB SEARCH, BY AGE GROUP

| AGE GROUP | "MATERIAL" FACTOR* (n=188) | "EXTRINSIC" FACTOR* (n=196) |
|---|---|---|
| 50-54 | -.16 | -.29 |
| 55-59 | -.31 | -.36 |
| 60-64 | .17 | .21 |
| 65-69 | .25 | .24 |
| 70-74 | .24 | .35 |
| 75+ | -.86 | -.32 |

* Lower scores on these factors indicate that sample members attached more importance to these items. See Tables 3 and 5 for components of these factors.

Among the specific work value items, "additional income" was most important among the younger workers (71 percent of those age 50-59 reporting additional income to be "very important" to them). "Good wages" were reported as very important for 71 percent of the younger workers, 49 percent of those aged 60-64, and 60 percent of the oldest workers (age 65 and over). Similarly, the importance of "fringe benefits" showed a curvilinear relationship with age group, with the 60-64 year age group reporting least importance in this work value.

Responses by age group also varied in a curvilinear fashion with several non-material work value items, although not always in the same direction. Seventy-seven percent of the youngest group felt that "interest in learning new things" was very important for them in a job, compared to 58 percent of those age 60-64, and 73 percent among those age 65 and older. On the other hand, having friendly co-workers, and meeting new people were work values held to be of higher importance among the 60-64 year old workers than the other age categories. For example, 87 percent of this age group reported that friendly co-workers were very important for a successful job, compared with 81 percent of those age 50-59 and 78 percent of those age 65 and over.

Similar patterns were evident among the specific motivation items, leading to the conclusion that job success is perceived quite differently within the broad group known as older workers. Specifically, persons seeking new jobs in their fifties or after age 65 are different than those in the traditional "retirement" years.

### Gender

Some researchers have found that women tend to place greater value on extrinsic characteristics, like job security, than men (Taveggia and Ziemba, 1978), while others have found that women place greater value on certain intrinsic characteristics, especially friendly co-workers (Bartol and Manhardt, 1979). Our research with older workers tends to corroborate both patterns, although extrinsic differences were more pronounced.

Cross-tabulations using individual work value and motivation items show that women were more likely to report that extrinsic characteristics such as wages, fringe benefits, and medical insurance were important work values and more significant motivators in their recent job search. With respect to work values, 68 percent of the women sampled reported that fringe benefits were "very important" to them in their jobs, compared with 51 percent of the men. Regarding the need for additional income, 71 percent of the women reported this to be very important, compared with only 37 percent of the men. Similar differences were reported on medical insurance and other material factors. T-Tests run on both the "Material" work value factor and "Extrinsic" motivation factor showed statistically significant differences between women and men. Results are shown in Table 7.

TABLE 7

FACTOR SCORES ON "MATERIAL" WORK VALUES AND "EXTRINSIC" MOTIVATIONS IN JOB SEARCH, BY GENDER

| GENDER | "MATERIAL" FACTOR* (n=190) | "EXTRINSIC" FACTOR* (n=198) |
|---|---|---|
| Female | -.12 | -.21 |
| Male | .19 | .35 |

* Lower scores = more importance attached to these factors. See Tables 3 and 5 for components of these factors.

Women also tended to score higher than men on several non-material factors. For example, more women than men believed it was very important to learn new things at work and to have friendly co-workers. Gender differences on these factors, however, were not as large as they were on the material items. In summary, older women clearly valued material rewards more than older men in this sample, both in terms of general work values and when searching for a new job.

## Education

The hypothesis that younger workers place greater value on intrinsic features of work frequently centers on the alleged impact of education. Younger workers tend to have greater education than their elders, especially college education, and it is argued that this experience tends to instill greater expectations in terms of meaningful work (O'Toole, et al., 1973).

In our examination of education, a number of success factors showed large differences across levels of workers' education. Most generally, an inverse relationship was found between educational level and the "Material" work value and "Extrinsic" motivation factors. The ANOVA in Table 8 shows these differences.

TABLE 8

FACTOR SCORES ON "MATERIAL" AND "EXTRINSIC" FACTORS, BY LEVEL OF EDUCATION

| LEVEL OF EDUCATION | "MATERIAL" FACTOR* (n=189) | "EXTRINSIC" FACTOR* (n=197) |
|---|---|---|
| Less than high school | -.14 | -.30 |
| High school/vocational | .20 | .04 |
| Some college | .47 | .25 |

* Lower scores = more importance.
See footnote, Table 6 for further explanation.

A look at specific items that comprise the material work value factor elucidates the results in Table 8. Job security, for example, was much less important for college graduates than for those with high school education or less. Whereas 81 percent of those with high school degrees or less education felt job security was very important, only 50 percent of college-level workers felt this way (p=.001). Results about educational differences regarding medical insurance, fringe benefits and good wages were also statistically significant. For example, 44 percent of college graduates believed fringe benefits to be very important to them in a job, compared to 70 percent of those with high school or less education. Similar differences were found when individual motivation items were examined as dependent variables.

Turning to non-material work values, respondents with less than a high school education considered job compatibility more important than college-educated respondents. Interestingly, 55 percent of the lowest educational group felt it was very important to use their acquired skills while only 45 percent of the college graduates rated this as very important. Formal education may help develop skills which can be generalized, leading individuals to believe they are more adaptable in the workplace. Job location and having comfortable working conditions were more important to lower educated than higher educated older workers. Taken together, these findings show educational level to be directly related to flexibility in the workplace among newly hired older workers.

Finally, it is interesting to note that having a supervisor of approximately the same age was seen as important for less educated respondents but not for those with college educations. This distribution had a chi-square significance at the .01 level. Such a finding suggests that lower educated workers have a greater need for empathy from their supervisors, something they may believe to be more probable with a person whose age is close to their own.

## Income

As we have just seen, those with a lower education tend to value extrinsic job characteristics more highly than those with greater education. At least part of this relationship can probably be explained by the positive relationship between education and income. In other words, those with greater education are more likely to have better paying jobs, and those who have greater incomes are more likely to be financially secure.

Findings regarding income support this argument. Material factors among both work values and motivations in specific job searches were significantly different across older workers' income categories. Results of ANOVAs in which MATERIAL and EXTRINSIC factors are related to income are shown in Table 9 below.

TABLE 9

**FACTOR SCORES ON "MATERIAL" AND "EXTRINSIC" FACTORS, BY LEVEL OF HOUSEHOLD INCOME**

| HOUSEHOLD INCOME | "MATERIAL" FACTOR* (n=189) | "EXTRINSIC" FACTOR* (n=197) |
|---|---|---|
| $10,000 or less | -.18 | -.36 |
| 10,001 - 20,000 | -.12 | -.30 |
| 20,001 - 30,000 | .03 | .22 |
| More than 30,000 | .43 | .51 |

* Lower score = more importance attached to this factor. See Table 6 footnote for more details.

As might be expected, workers with low incomes had a greater need for wages, job security, fringe benefits, and the other variables which constitute these two job success factors. There was a linear relationship on both factors, with the importance of material benefits decreasing as one goes up the income ladder from the below-$10,000-per-year category to the more-than-$30,000-per-year category.

In terms of immediate job search motivations, the desire for additional income was greatest among the $10,000-$20,000 group. The need for medical insurance in the search for the recent job was most important for the below $10,000 per annum workers (chi-square = .004) while fringe benefits were required more by the $10,000-$20,000 income group (chi-square = .026). In general, material/extrinsic work values and motivations broke out into a distribution whereby the lower income workers (below $20,000 per year) believed them to be more important for job success than the higher income workers.

There was a similar distribution across the "Job Compatibility" factor, with the lower income workers believing that using acquired skills, job location, and having comfortable working conditions were more important than higher income workers. Specifically, the $10,000-$20,000 group rated job location and comfortable working conditions as more important than any of the other income groups. Having a supervisor close to one's own age was most important for the below $10,000 group and least important for the over $30,000 workers.

Other results appear to be counter-intuitive. On the items which deal with immediate job search expectations, the lowest income group reported substantially higher ratings on all of the intrinsic or non-material success factors than the highest income group. For example, "meeting new people" was very important for 70 percent of the poorest workers, but only for 41 percent of the wealthiest workers. Similar patterns were found for other intrinsic work values, such as "feel useful," "work is interesting," the need "to be challenged," and wanting to "do something different." There is some concern that a response set may have taken place among the lower income respondents which caused them to rate many or most of the sub-factor items with a "very important" response.

### Household Composition

The composition of the household can be expected to have an impact on extrinsic values and motivation. Presumably, the presence of many children creates or enhances the need for additional income and fringe benefits, especially medical insurance. Loscocco (1989) has recently found this pattern to hold among factory workers.

Our findings exhibit a very different pattern. In the ANOVA using the "extrinsic motivation" factor, married couples with children in the home and married couples without children in the home had less of a need for additional income, medical insurance, and fringe benefits than the other two household composition categories (significant at .007). This is probably a function of the age of the other members of the older respondent's household. As opposed to younger families where children are economically dependent, extra household members are potential sources of extra revenue in the case of older families.

Another ANOVA reveals that married couples with children living with them rated "social environment" far lower in importance than the other household categories (married couples without children in the household, single persons sharing living quarters with another person, and persons living alone). This ANOVA was significant at the .04 level.

Looking at individual items, married couples with children and persons living alone scored highest on "learn new things" (mental stimulation) with very important ratings of 80 percent and 83 percent respectively. "Good wages" (material benefits) were most important to single individuals sharing living quarters with another person and those living alone.

### Health Status

Some differing views appeared across the self-reported health status categories of "excellent," "good," and "fair," although not as substantial as with other variables. None of the ANOVAs were significant at the .05 level or below. The trend, however, was for those with the worst self-reported health to report the greatest interest in "material" work values and motivators.

The opposite appeared to be the case for the non-material items. Those with excellent and good health status believed the need to feel useful in a job to be more important, with 80 percent and 77 percent of these people respectively rating this as very important, compared with 57 percent of those with fair or poor health. There was a relationship between the importance attached to being challenged in a job and health status. Those with excellent health reported the greatest importance of challenges at work, while those with the worst health reported the least amount of importance on this item (chi-square on this distribution = .05). A similar trend was indicated with the variable "do something different." Based on these findings, it can be concluded that those with the best self-reported health status appeared to require intrinsic and non-material benefits from their work while those with the poorest self-reported health appeared to require material and extrinsic rewards.

### Physical Limitations

Even fewer differences existed on the variable of self-reported physical limitations. Small differences occurred in the work values, with those reporting physical limitations finding job security to be very important (80 percent) compared with 68 percent of those with no physical limitations. As one might expect, those reporting physical limitations rated items such as the need for convenient job location, comfortable working conditions, and job flexibility as slightly more important than those not reporting physical limitations. However, none of these differences was statistically significant.

## 2. Structural Variables

### Prior Work History

It is clear that several individualistic variables are related to older workers' job success-related values and motivations. Findings now turn to whether structural factors (i.e., prior work experience) influence work values and motivation.

A factor analysis was run on the seven items in the interview which examined the older workers' main job in their prior work history. Two factors emerged from this analysis. What we have entitled "skill" consists of a job history where the worker learned new things, used skills and abilities they had developed, and actually had a high level of skill involved with the work.

A second factor entitled "Job Control" consisted of four job history items which generally dealt with the relationship between the worker and her/his work product (e.g., decision-making and impact on the final product). A summary of this factor analysis is shown in Table 10.

TABLE 10

SUMMARY OF FACTOR ANALYSIS OF MAIN JOB IN PRIOR WORK HISTORY

| FACTOR 1 Skill | FACTOR 2 Job Control |
|---|---|
| Learn New Things (.742) | Freedom to Decide What I Do (.556) |
| Use Skills (.785) | Do Something New (.639) |
| High Level of Skill Required (.789) | Decide How to Do Job (.726) |
| | Impact on Product (.526) |

Pearson correlation coefficients were run to determine the relationships that existed between work value and motivation factors, and prior work history factors. The "Skill" factor appears to be related to "Stimulate" (R = .14; probability less than .05). This means that those older workers with job histories involving continued learning and high level use of skills generally valued learning and having a sense of accomplishment in their work.

The prior work history factor "Job Control" was correlated with one work value and one motivation factor. The Pearson R for "Job Control" and "Flexible" was .16 (probability = .029). This suggests that respondents with prior work histories involving freedom to choose and a general sense of empowerment in the job generally valued interesting work and job flexibility in the interview. The Pearson R for "Job Control" and "Extrinsic" was also .16, suggesting that people with a prior work history with significant job control were specifically interested in extrinsic/material rewards in their recent job search.

Next, ANOVAs were run to determine the nature of the relationship between job success factors and individual characteristics in the workers' prior work history. The following relationships resulted from these analyses (each with an ANOVA significant at .10 or less):

- Those who strongly agreed having freedom to decide what they did on their main job (in their work history) strongly valued job flexibility as a current work value.
- Those who strongly agreed that their prior work history involved constantly learning new things generally valued mental stimulation and flexibility.
- Those who strongly agreed that they were used to having responsibility to decide how to do a job valued flexibility.
- Those who had work histories which required a high level of skill tended to value mental stimulation as a current work value.
- Those who strongly agreed that they could see the impact of their work in their previous careers highly valued intrinsic benefits in their specific and immediate job searches.

## 3. Summary and Conclusion

Both individualistic and structural variables were found to have an impact upon the work values and motivations of older workers in this sample. Furthermore, these variables generally had the same impact upon this sample of older workers as they do upon workers in general. For example, as has been documented in other research, those with a low income place greater emphasis upon extrinsic values and motivation, and skilled workers are likely to place a higher value on intrinsic job characteristics than unskilled workers.

There were, however, some interesting exceptions that were discovered by focusing upon this subpopulation of workers. For example, bivariate analysis showed a curvilinear relationship between age and the extrinsic work value, material benefits. This kind of result can only be revealed when older workers are treated as other than a homogeneous group. Another exception to research which looks at all workers involves the impact of household composition. Among older workers, the more members of the household, the less likely the worker is to be extrinsically motivated in searching for work.

Consistent with the results of Question #1, the results of Question #2 tend to support the position that older workers are not dramatically different from other workers in their values and motivation. On the other hand, much diversity exists within the population of older workers which cannot be ignored.

### C. RESEARCH QUESTION #3: **What job characteristics are related to successful job placements/experiences?**

1. Descriptive Results: Rones (1983) suggests that the most commonly used measure of labor market success is the employment rate. This approach to success ignores the issue of matching between employee interests and available jobs. Some large employment programs, such as the Job Training and Partnership Act, have considered a job placement to be "successful" if, in fact, the job seeker actually locates employment (Fitzsimmons, 1986).

In this study we were interested in examining job success in terms of tenure and the worker's level of job satisfaction. Job satisfaction has been described as a positive or pleasurable emotional state resulting from the appraisal of one's job or job experience. An individual's job satisfaction is dependent on an interaction between the person and the work environment and is a function of what a person expects from his or her work environment and what he or she actually attains (Locke, 1976).

The first measure of job success we examined was job persistence or tenure. In this sample, 74 percent of the workers were still with the same company, business, or organization at the time of the T2 interview. Those who left the job appear to have done so for numerous reasons. Twenty-eight percent of those who left their jobs reported that the company no longer needed their services. This was the largest category of reason for separation from their job. The next most important reason (21 percent) was due to the older worker not liking her/his job. Smaller numbers of people reported that their own health or the health of a family member was the principal cause of their leaving. These health and family problems have been referred to in the literature as "situational barriers" to work (Brady et al, 1987). Other reasons reported by the sample for not remaining on their new jobs were that the job was too hard to get to or that the company went out of business. Two people reported that they had been fired.

Respondents were asked their overall level of satisfaction with the job taken four months ago. Forty-eight percent (48%) reported that they were very satisfied and another 37 percent that they were somewhat satisfied. Fourteen percent (14%) reported that they were somewhat dissatisfied and one older worker said that he was very dissatisfied.

An open-ended follow up to this question was asked, i.e., why did they feel the way they did about their new job? A theme analysis was conducted on these open-ended responses yielding six categories of "reasons" for satisfaction or dissatisfaction.

By far the most frequently reported reason for both being satisfied or dissatisfied with their new jobs were the other people with whom the older employee worked. Fully half the responses to this question referenced, at least in part, the older employees' co-workers. Typical responses were, "The people I work with are a big factor--they're good to work with," and "Everyone is very cooperative and appreciates me." Interestingly, even when other factors were not working out as well as expected, the human relationships involved at work had an overriding influence on the worker's general evaluation of the job. An example of this is the person who responded, "I can't stand very long because my feet hurt, but I love my co-workers . . ."

While less frequent, people also evaluated their general work experience negatively due to co-workers. "Too much gossip in the office," "I dislike some of the people," or "I dislike the work habits of some of my co-workers," are examples of this response. One person was having an unpleasant experience because there were not opportunities to interact with co-workers: "I don't like to be alone on the job and would rather be working with other people."

A second major theme that emerged from this open-ended follow-up question was that of the nature of the work itself. Again, as with the first theme, the specific nature of the work explained both positive and negative work experiences. Examples of positive experiences are represented by comments such as, "I like the type of work I do--working with the elderly," "I don't have to take the job home with me," and "I enjoy doing what I'm doing." But numerous people remarked about the tedium, the imbalance, or the stress of their work: " . . . Boring job, and tedious," "A lot of seat work and a lot of repetition," "It is always the same routine," "Lots of slack time during the day with nothing to do," and "Sometimes they put too much pressure on me."

A third theme is the worker's supervisor. Again, both positive and negative comments were reported. "I have good bosses," "The boss makes you feel at home," and "I have a very good manager and boss" are representative of those who have had a successful experience with supervisors. But there were others who have had quite the opposite experience with their new jobs: "Problems with my boss," "My supervisors gave orders I didn't think were right," "It is trying because the woman I work for is somewhat eccentric . . ."

Fourthly, the theme of compensation occurs with frequency in this open-ended question about reasons for general satisfaction or dissatisfaction with the job. These tended to be mostly negative. "Hard work for such little pay," "It doesn't pay me enough," and "I liked the job but the salary wasn't good," are representative remarks. Most people who are generally satisfied with their new jobs (which represents, as reported earlier, 85 percent of the sample) do not mention wages/salary as a major reason for their general satisfaction. However, this theme does become more pronounced among those who tend to be less happy with their work.

A fifth theme was that of the stress or pressure experienced on the job (which, naturally, is related to the nature of the work itself--but enough of these responses occurred to make it a distinct category). "Perfect job for an older person who doesn't need a lot of stress." Others referenced the ease of the pace or the fact that they could leave their work in the office or on the shop floor at the end of the day.

Finally, a sixth theme was that of the proximity of work to home and the convenience of work hours. "It's walking distance, and I don't like to work too many hours," "It's on the bus line so I can get to work," "It is near my home." Regarding the work day, people mentioned things such as "I like the early morning hours," "They gave me the hours and days I want," "I don't work past 3:00, not before 8:00, and no weekends . . ." A smaller number of respondents reported their discontent with proximity of their place of work and working hours.

In addition to seeking an overall satisfaction level with the new job, workers were asked to rate their satisfaction level on 13 specific job characteristics, ranging from job security and wages to their ability to make independent decisions and use previously developed skills and abilities. A wide range of responses were recorded. These data are displayed in Table 11.

Similarly, workers were asked to rate on a "strongly agree . . . strongly disagree" scale the actual job characteristics of their current (new) job. Table 12 describes these data.

A factor analysis was run on the eight items constituting current job characteristics (see Table 12). Three factors emerged from this analysis. What we have entitled "Skill - 2" is comprised of items such as "the job requires that the worker keep learning new things," "using skills and abilities already developed," and the requirement of the use of high level

### TABLE 11
### SATISFACTION WITH SPECIFIC JOB CHARACTERISTICS - TIME 2 INTERVIEW

| ITEM | VERY SATISFIED | SOMEWHAT SATISFIED | SOMEWHAT DISSATISFIED | VERY DISSATISFIED |
|---|---|---|---|---|
| 1. How satisfied are you with the job security of your current job? | 43.9% | 33.1% | 14.6% | 8.3% |
| 2. How satisfied are you with how interesting your job is to you? | 43.5 | 37.9 | 14.9 | 3.7 |
| 3. How satisfied are you with the opportunities to learn new things? | 38.2 | 32.3 | 21.1 | 8.6 |
| 4. How satisfied are you with the wages you are earning? | 15.5 | 47.8 | 27.3 | 9.3 |
| 5. How satisfied are you with the chances to make independent decisions? | 40.6 | 38.1 | 16.3 | 5.0 |
| 6. How satisfied are you with your relationships with your co-workers? | 77.1 | 17.2 | 4.5 | 1.3 |
| 7. How satisfied are you with the sense of accomplishment you get from your job? | 54.0 | 29.8 | 9.9 | 6.2 |
| 8. How satisfied are you with the chance to use skills developed during previous jobs? | 33.1 | 33.8 | 18.5 | 14.6 |
| 9. How satisfied are you with the distance between where you live and where you work? | 66.0 | 24.1 | 6.8 | 3.1 |
| 10. How satisfied are you with your immediate supervisor? | 70.6 | 22.2 | 5.2 | 2.0 |
| 11.*How satisfied are you with the opportunities for promotion or advancement? | 38.7 | 25.8 | 22.6 | 12.9 |
| 12.*How satisfied are you with the review procedures and evaluations? | 48.2 | 31.6 | 14.0 | 6.1 |
| 13. How satisfied are you with the company or organization that you work for? | 59.7 | 32.7 | 5.7 | 1.9 |

*Because many workers felt these items to be inapplicable to their current job situation, there were a substantial number of missing cases for Questions #11 (72) and #12 (51).

TABLE 12
LEVEL OF AGREEMENT ABOUT CURRENT JOB CHARACTERISTICS
TIME 2 INTERVIEW

| ITEM | STRONGLY AGREE | AGREE | DISAGREE | STRONGLY DISAGREE |
|---|---|---|---|---|
| 1. I have the freedom to decide what I do with my job. | 6.3% | 46.3% | 43.1% | 4.4% |
| 2. My job requires that I keep learning new things. | 12.5 | 48.8 | 36.3 | 1.9 |
| 3. My job lets me use my skills and abilities. | 15.6 | 51.9 | 30.0 | 2.5 |
| 4. My job requires that I do the same things over and over again. | 15.6 | 61.9 | 21.9 | 0.6 |
| 5. It is my own responsibility to decide how my job gets done. | 14.3 | 57.8 | 26.1 | 1.9 |
| 6. My job requires a high level of skill. | 7.5 | 29.8 | 60.9 | 1.9 |
| 7. I can tell what impact my work has on the product or service. | 18.9 | 70.4 | 10.7 | 0.0 |
| 8. My job is closely supervised. | 10.6 | 37.3 | 49.1 | 3.0 |

skills on the job. "Routine" consists of the job requiring that activities be performed over and over again and being closely supervised. The third factor, "Independence," consists of having freedom to decide what to do with the job, having responsibility to decide how the job gets done, and seeing the impact one's work has on the final product or service. A summary of this factor analysis is shown in Table 13.

Other measures to determine job satisfaction were asked in the T2 interview. One of these was whether or not the older worker, knowing what he

## TABLE 13

## SUMMARY OF FACTOR ANALYSIS OF CURRENT JOB CHARACTERISTICS

| Factor 1 | Factor 2 | Factor 3 |
|---|---|---|
| "Skill 2" | "Routine" | "Independence" |
| Learn New Things (.785) | Same thing Over Again (.561) | Freedom to Decide (.777) |
| Use Skills and Abilities (.604) | Closely Supervised (.873) | Responsibility to Decide (.797) |
| Requires High Level Skill (.732) | | See Impact on Product/Service (.696) |

now knows, would recommend this job to a friend. A large majority (88 percent) reported that they would, in fact, recommend the job they had taken to a friend. In addition, the worker was asked if, knowing what they now know, they would still take this job. Eighty-three percent (83%) said they would. We shall leave interpretation of the five percent who would recommend to friends jobs they wouldn't take again themselves for another time and another study.

Similar to the follow-up on the question about general satisfaction/dissatisfaction with their new job, respondents were asked why they would choose once again to take this job if they were in a position to do so. Responses to this open-ended question, while reported by fewer numbers of respondents, were similar in nature (i.e., approximating the six heretofore reported themes) to the earlier follow-up question.

2. Bivariate Analyses: A number of job characteristics appear to be related to whether the worker remained in the same business during the interval between the Time 1 and Time 2 interviews. Regarding categories of employment, those in educational (92 percent) and financial/insurance (84 percent) types of work had the highest rates of persistence. The lowest rate of persistence (62 percent) was in jobs in the building and manufacturing industry. The fact that older workers who have located work in education tend to persist appears to support the findings of Caroline Bird (1988) who reported that many people who seek work in later life wish to be in the educational sector.

Turning to self-reported characteristics of the new job, 82 percent of those who persisted in the same business or organization either strongly agreed or agreed that they were able to use their skills and abilities. Of all those who were no longer in the same place of business, 42 percent reported that they were not able to use their skills and abilities (on the job they had just left).

Similarly, workers who persisted in their new jobs tended to report that they had responsibility to decide how to get the job done and could tell what impact their work had on the final product or service. Most workers (57 percent) who were still at the business for the Time-2 interview reported that they were not being closely supervised on the job. Of those who were no longer in the same company at the Time-2 interview, 66 percent reported that they had received close supervision.

Bivariate relationships were also examined between job satisfaction and categories of employment. More than half the workers in food and retail, financial and insurance, and educational jobs report being "very satisfied" with their work, with the highest proportion (69 percent) being in education. The lowest proportion of "very satisfied" workers (38 percent) were in building/manufacturing jobs.

Looking at self-reported aspects of the new job as a criterion of job placement success, of the 88 people who reported being "very satisfied" with the job, most (56 percent) agreed they had freedom to decide what to do at work. Of those who were somewhat or very dissatisfied with their jobs, most reported they did not have such freedom.

Other job characteristics appear to be related to feelings of job satisfaction. Half the workers who reported being "very satisfied" with their work agreed that they could use their skills and abilities. To the contrary, 70 percent of those who were dissatisfied reported they were not using previously acquired skills and abilities (chi-square = .000). A very large proportion of the sample (95 percent) who reported being very satisfied with their new job were able to see the impact of their work on the product or service being produced. More than half of those who reported being very satisfied also report not being closely supervised at work. Therefore, the job characteristics that appear to be related to persistence on a new job are also related to general job satisfaction.

A third job success factor we examined was the similarity between the job the older worker held and that which she/he had originally sought. There was a good deal of variation reported here, with 15 percent of the sample reporting that their job was exactly the same as the one they had looked for, 26 percent saying it was almost the same, 18 percent somewhat different, 14 percent very different, and 27 percent completely different.

Of those who reported their jobs were exactly the same as the one they sought, 25 percent strongly agreed and 71 percent agreed that they were able to use skills and abilities on that job. To the contrary, 50 percent of those who felt their job to be "very different" and 39 percent of those who felt it to be "completely different" from that which they sought disagreed that they were using their skills and abilities (chi-square = .027).

In summary, numerous current job characteristics appear to be related to measures of job success (persistence on the job, general job satisfaction, and match between expectations and the actual job) among older workers. Worker freedom, as expressed in the ability to decide how to get a job done and not being too closely supervised, the ability to use skills previously acquired, and being able to see the impact one's work has had upon the product or service all appeared to have a positive relationship with job success.

## D. RESEARCH QUESTION #4: **How do background and job characteristics interact to shape successful job placements/experiences among older workers?**

In this research question, we are looking at how structural (job characteristics) and individualistic (socioeconomic and demographic) variables explain job placement success. In Research Question #2, we examined how older workers' overall definitions of successful work vary according to structural and individual characteristics as assessed in the Time-1 interview. In Research Question #3, we looked at Time-2 interview data to examine the relationship between current job characteristics and successful job placements. Now, merging T1 and T2 data, we examine how all of these variables interact to explain job placements among older workers.

Bivariate analyses revealed several relationships between worker characteristics and persistence on the job. Women are much more likely to persist at the place of business (82 percent) than men (61 percent). People with self-reported poor health were least likely to remain in the same place of business (63 percent) as compared with those who reported good or excellent health (76 percent). Finally, the curvilinearity we have reported elsewhere on the variable of age appears again here. Those age 50-59 (73 percent) and age 65 and over (80 percent) are more likely to have remained in the same place of business than workers age 60-64 (67 percent).

Regarding job satisfaction, gender and income had the greatest relationship with positive worker satisfaction. Women were more likely to be "very satisfied" (54 percent) with their new jobs as compared with men (41 percent). Those with annual incomes less than $10,000 were likely to be very satisfied (55 percent) compared with those with incomes over $30,000 (24 percent).

Finally, regarding whether or not the older worker's new job matched what she/he sought, educational level was the most significant predictor. Twenty-eight percent of those with Grade 11 or less educational levels felt their new job was "exactly the same" as the one they were seeking during their job search. This compared with eight percent for workers with a college level education.

In order to examine multivariate relationships, a stepwise regression analysis was run using each of the major job placement success variables as dependent variables. These included: whether or not the older worker remained in the same business/organization; the worker's level of satisfaction with the new job; and how close the job was to the one they were seeking. The independent variables entered into each of these regression equations were the respondent's gender, age, educational level, income, ethnicity, prior work history characteristics (factors = "skill" and "job control"), and current job characteristics (factors = "skill-2," "routine," and "independent"). Finally, length of employment on the job prior to the T1 interview was entered so we could control for this variable.

The most important predictor of whether or not the employee remained in the same place of business between T1 and T2 was gender. Women were much more likely to have persisted on the job, even after all other independent variables were statistically controlled. Other variables which entered the regression equation were the two prior work history factors "job control" and "skill," and ethnicity.

Finally, the "skill-2" factor is the only variable from all of the individualistic, structural, and job characteristics variables entering into the third regression equation to explain the match between the kind of job sought and that which was actually located. Therefore, continuity of skills across the worklife and the ability to remain challenged at work is what most older persons want in a job placement.

# IV: CONCLUSIONS AND RECOMMENDATIONS

## A. MAJOR CONCLUSIONS

The major conclusions derived from this study of older workers in new jobs fall into two areas: (1) patterns in general work values and motivations when job seeking; and (2) patterns in job placement success.

### 1. General Work Values and Motivations:

a. Older workers reported both general values related to successful work and specific motivational values related to an immediate job search. These two images of success are highly compatible, although not precisely alike. For example, the three most important characteristics of general job success found in this study were feeling a sense of accomplishment, having friendly co-workers, and having interesting work. The three most important motivational values in the recent job search were a desire to feel useful, being able to earn additional income, and meeting new people.

b. Both general work values and specific motivational goals appeared to divide into two major types of factors: those which deal with material benefits (wages, insurance, fringe benefits) and those which deal with stimulation and the work environment (learning, job flexibility, relationships, sense of accomplishment). Both of these types of success factors, which the sociology of work literature often labels "extrinsic" and "intrinsic" benefits, respectively, played a major role in the work-lives of older persons.

c. Intrinsic work values (i.e., feeling useful, having interesting work, being challenged on the job) were important to most older workers. While there were variations of degree of interest in intrinsic values among older workers, the data from this study revealed that there is no category of older worker (i.e., gender, age group, educational level, family income level) to whom intrinsic job values are unimportant. In the words of one older worker, "psychic income" is a highly valued characteristic of later life employment.

d. The compatibility of co-workers arose repeatedly as an important characteristic of successful employment among older workers. Over 80 percent of the research sample reported that this was "very important" to them in any job (Time-1 interview). Once people had been on their new job at least four months (Time 2 interview), the nature of their relationships at work was the most frequently cited reason for either being satisfied or dissatisfied with work.

e. Women in this study were more concerned with extrinsic job benefits than were men. For example, regarding the importance of additional income, 71 percent of the women in this sample reported this to be very important as compared with only 37 percent of the men. More than likely this pattern reflects women's more vulnerable financial situation in later life as compared with that of men.

f. There appears to be a curvilinear relationship between interest in extrinsic rewards from work and age. Workers in their 50's reported a greater degree of interest in general financial matters than workers in their early 60's. However, if persons in their late 60's or 70's were still seeking employment, they noted a renewed interest in the priority of extrinsic/material as compared with other rewards.

2. Job Placement Success:

a. An important measure of job placement success, but one which few research efforts have observed, is persistence on the new job among older workers. In this study, women stayed in the same place of business between the T1 and T2 interviews considerably more often than men. Regardless of gender, respondents who reported using their skills and abilities, who could decide how to get their job done, and who could see the impact of their work on the product or service, also tended to persist in the new job.

b. General job satisfaction is another measure of a successful job placement, but again one that has not received attention among older workers. Independence and job control appeared to be related to job satisfaction in this sample. Older workers who were not closely supervised reported substantially greater work satisfaction than those who were closely supervised on the job.

c. Women reported greater general job satisfaction than men. Lower income workers reported greater general job satisfaction than higher income workers.

d. The match between the kind of job an older worker sought and what she/he actually found is another measure of successful job examined in this study. The use of previously developed skills and abilities emerged as an important determinant among those workers who reported a close fit between their expectations and the job they found. This relates closely to the top rated general 'work value' among older workers in this study, i.e., wanting to feel a sense of accomplishment in a job.

## B. RECOMMENDATIONS

Recommendations from the data collected in this study are made for: (1) aging network and employment service practitioners; and (2) further gerontology research.

### 1. For Aging Network and Employment Practitioners:

a. Employers, job service counselors, job-bank personnel, and others advocating for or providing direct service to older persons' employment needs should pay attention to non-material as well as material work benefits. It is traditional to focus attention on items such as wages, insurance, fringe benefits, and other extrinsic factors associated with a job. But older workers are also very interested in intrinsic work benefits, those which provide a "psychic income" to them in their later years.

b. Contrary to some recent findings in the literature (Bird, 1988), older workers in this study appear to want some basic continuity between their earlier career commmitments and late-life work. Specifically, being able to engage skills and abilities they have already developed over a lifetime of employment is a predictor for job persistence and satisfaction among older workers. While it may work with some, swapping 'apples' for the 'oranges' of one's lifetime career competencies and experiences is not likely to bring satisfaction to most older workers.

c. The "freedom-factor" is an important ingredient in successful late-life work. Older persons want to have a degree of flexibility on the job, be able to make some decisions about how their work is going to get done, and prefer not to be too closely supervised at the work-site. Employers who are able to respect this need for freedom, and the sense of respect that granting such freedom communicates to the employees, are likely to have workers who will persist in the organization and have high levels of job satisfaction.

d. Older workers bring decades of skill and experience to the workplace. This study indicates that they want to be able to carry these abilities into new jobs they may take in later life. Employers who hire older workers ought to be aware that they are hiring people who can and do bring substantial contributions to an organization.

2. For Further Gerontology Research:

a. This study has examined images of successful work from the perspective of the older employee. It is important to examine such images and values from the point of view of employers of older workers. What does the work organization consider to be a "successful" job placement? Are these images and values compatible with those found among older workers themselves in this study?

b. A number of variables emerged in this study as being important for job success which deserve to be followed up in greater detail. For example, workers report they are happier when they are not being closely supervised on the job. What exactly does this mean? What specific supervision strategies appear to work or not work well with the older employee? Also, older workers report that continuity of skills and abilities from their previous work lives is important to them. Greater detailing of this idea (perhaps by way of critical incident or qualitative interview data) would help to paint a better picture of the meaning of such a finding.

c. The age group most closely associated with "retirement," i.e. ages 60-64, appears to share different value perspectives from younger (people in their 50's) and older workers. It is due to this cohort that the curvilinearity reported in the body of this study on age by various job success factors in fact exists. What is going on here? A more detailed analysis of this age group might provide helpful data for retirement or late-life career counseling and placement.

d. A study of a broader sample of older workers' job success values and motivations is merited. This study focused attention on job changers. Would views of successful work be different among older workers who are not in an employment transition or who are not being trained and placed by JTPA, SCSEP and job service programs (as many people in this sample were)?

e. A larger sample of older persons would allow conclusions to be drawn about work values and motivations among minority elderly. Very little is understood about work expectations and placement success among older persons representing ethnic minorities in the United States.

f. Finally, a cross-national study would illuminate similarities and differences in work values, motivations, and job success measures among older persons who have spent their entire working lives in diverse cultures and politico-economic systems.

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# APPENDIX 1

## Older Worker Referral Materials

UNIVERSITY OF SOUTHERN MAINE

Human Services Development
Institute

96 Falmouth Street
Portland, Maine 04103
207/780-4430

Thank you very much for agreeing to serve as a referral source for the study funded by the AARP/Andrus Foundation entitled: "Predictors of Success Among Older Workers Placed in New Jobs." We will refer to this study as the "Older Worker Project" in future communications and all forms related to the research.

As we discussed, we have prepared several forms for the Older Worker Project which you will find enclosed in this mailing. Please check to be sure that you received the following:

- Referral instructions
- Project description
- Participant Consent Forms
- Participant Information Forms
- Prepaid self-addressed envelopes
- Draft list of survey items

All of these forms should be self-explanatory, but please feel free to call us if you have any questions. Please let us know if/when you need additional copies of forms, or else make copies and send us a bill for copying and postage so we can reimburse you.

At this point, we plan to begin accepting referrals on February 15, 1988. We will let you know if this changes.

Thanks again for your assistance in this project. Please call if you have any questions.

Sincerely,

Michael Brady, Ph.D.
Principal Investigator
(780-5312)

Richard Fortinsky, Ph.D.
Project Director
(780-4430 or 4451)

RF/csh
Enclosures

Public Policy and Management Program

UNIVERSITY OF SOUTHERN MAINE

Human Services Development
Institute

96 Falmouth Street
Portland, Maine 04103
207/780-4430

## OLDER WORKER PROJECT

## PROJECT DESCRIPTION

The University of Southern Maine (USM) has received a grant award from the AARP/Andrus Foundation to study job success among older persons (aged 50 or older) who start new jobs. We believe that results of our study will provide very important information for employers, job training organizations, and older persons looking for work.

Our study requires the participation of older workers in Maine who have started a new job since January 1, 1988. Participation will involve two (2) telephone interviews with professionally-trained interviewers at USM. Each interview will last about fifteen (15) minutes, and they will be conducted approximately four (4) months apart. We will ask questions about what older persons consider important in new jobs, why they chose the new job in 1988, and their job histories.

It is important to understand that all information collected by USM interviewers for this study will be kept completely confidential. All results from this study will be presented in group or summary fashion only, so individuals cannot be identified.

We appreciate your cooperation in advance and will be happy to answer any questions you may have.

Michael Brady for

Michael Brady, Ph.D.
Principal Investigator
(780-5312)

Richard Fortinsky

Richard Fortinsky, Ph.D.
Project Director
(780-4430 or 4451)

Public Policy and Management Program

# OLDER WORKER PROJECT

## REFERRAL INSTRUCTIONS

Please follow these instructions when considering referring a person to the Older Worker Project at the University of Southern Maine (USM). Remember that in order to be eligible for our study, a person must:

* be 55 years of age or older
* have started a new job since January 1, 1988
* be engaged in paid employment for at least ten (10) hours per week

As you identify eligible persons, please do the following:

1. Read or provide the Project Description narrative to the person. You may share the draft list of survey items with the person.

2. Have the person sign a Consent Form and make a copy if you desire for your own records.

3. Complete the Participant Information Form (copies are enclosed). Please try to provide us with information on all items, especially the participant's home telephone number and the best time of day to call him/her.

4. Mail the Informed Consent Form and Participant Information Form to USM in the prepaid self-addressed envelope provided.

REMEMBER: We plan to begin accepting referrals February 15, 1988. Please continue to solicit potential participants until we inform you that the recruitment period has ended.

Thank you very much for your cooperation.

## OLDER WORKER PROJECT

### PARTICIPANT INFORMATION FORM

Today's Date ____________________

**ABOUT THE PARTICIPANT**

Name ______________________________________ Sex (Optional): __________

Street Address ________________________________________________________

City/Town and Zip Code ________________________________________________

Home Telephone Number _________________________________________________

Best time to call (specify) ___________________________________________

New Employer (Name) ___________________________________________________

Complete Address ______________________________________________________

Type of work __________________________________________________________

Date started new job __________________________________________________

**ABOUT THE REFERRING ORGANIZATION**

Name of Referral person _______________________________________________

Name of Organization __________________________________________________

Street Address ________________________________________________________

City/Town and Zip Code ________________________________________________

Telephone Number ______________________________________________________

Please return this form to USM using the prepaid self-addressed envelope provided.

Thank you!

# OLDER WORKER PROJECT

## PARTICIPANT CONSENT FORM

I, ______________________________________________, have read the
Participant's name. (Please print.)

project description or had it explained to me. I understand what I read, and any questions I had were answered.

I understand that my taking part in the Older Worker Project is voluntary. If I decide not to take part, I can change my mind later. I understand that my participation will not affect my job or any other programs normally available to me. I also understand that all information collected by the Older Worker Project will be kept completely confidential in accordance with the Federal Privacy Act of 1974.

________________________________          ______________
Participant's signature          Date

________________________________          ______________
Witness' Signature (optional)          Date

# OLDER WORKER PROJECT

## INITIAL SURVEY - DRAFT LIST OF ITEMS

- Importance of general work-related characteristics, such as time flexibility, proximity to home, job security, wage rate and fair treatment from supervisor.

- Specific questions about current (new) job, such as type of business or industry, and why respondent started job.

- Questions about work history and status prior to starting new job, including number of years worked full-time, primary occupation, volunteer work experience, and why respondent left most recent job (if applicable).

- Demographic and other background items, including age, household composition, and general health status.

PLEASE NOTE:

The followup survey, which will be conducted between three and four months after the initial survey, will focus on whether or not the respondent is still working at the same job. If so, we will ask questions about job satisfaction and plans for the future. If not, we will ask similar questions and also determine why the job did not work out.

# APPENDIX 2

## Communications with Referral Sources

UNIVERSITY OF SOUTHERN MAINE

Human Services Development
Institute

96 Falmouth Street
Portland, Maine 04103
207 780-4430

April 4, 1988

Dear

We would like to provide you with a brief update of our research project concerning older worker job placements in Maine and Connecticut. After working hard to polish our questionnaire, we are now ready to begin the interviewing process.

While we are on schedule with all other aspects of this project, we have not had the number of referrals of older workers that we had hoped would be the case by this time. As we have called around to talk with referral sources such as yourself, we have learned that the volume of job-placements for older workers has been particularly low the first quarter of this year. While our original intention was to accept referrals only into April, we now have revised our timetable to do so into the month of June.

It is very important for us to obtain our target of 100 older worker placement referrals in order for us to have enough data to make valuable conclusions and recommendations from this study. We deeply appreciate your willingness to help us. Please keep talking with your staff about the importance of this study and encourage them to refer older workers to this project. We cannot do our work without your help.

Please call either of us if you have any questions. Once again, we'd like to thank you for your willingness to be a source of referrals for this project.

Sincerely,

| | |
|---|---|
| Michael Brady, Ph.D. | Richard Fortinsky, Ph.D. |
| Principal Investigator | Project Director |
| (780-5312) | (780-4430 or 4451) |

Public Policy and Management Program

UNIVERSITY OF SOUTHERN MAINE

Human Services Development
Institute

96 Falmouth Street
Portland, Maine 04103
207 780-4430

**MEMORANDUM**

TO: Referral sources for the
Older Worker Project throughout Maine

FROM: Richard Fortinsky, Director, RF
Older Worker Project

DATE: April 25, 1988

EFFECTIVE IMMEDIATELY, we will accept referrals of persons aged 50 or older (instead of 55) who have begun new jobs since January 1, 1988.

Please notify your staff and/or job counselors of this change, which will expand the pool of "older workers" for our project.

WE WILL CONTINUE TO ACCEPT REFERRALS THROUGH JUNE 30, 1988.

Thanks for your cooperation. Please call me at 780-4430 if you have questions or need more forms.

Public Policy and Management Program

UNIVERSITY OF SOUTHERN MAINE

Human Services Development
Institute

96 Falmouth Street
Portland, Maine 04103
207/780-4430

MEMO TO: Referral Sources for the Older Worker Project

FROM: Michael Brady MB and Richard Fortinsky RF, Project Directors

DATE: June 28, 1988

We are now halfway through our one-year Older Worker Project and wish to update you on our progress.

Thanks to your cooperation, we have completed or arranged interviews with fifty-six (56) older workers throughout Maine who have begun new jobs since the beginning of 1988. This puts us just past the halfway point of our goal of one hundred (100) older workers. Many of you have sent us multiple referrals, which we greatly appreciate. We are now beginning to summarize results so far, and plan to share our findings with you at the end of this year.

Last month we attended the Unretirement Job Fair in Portland and spoke to many employers who were hoping to find mature adults to fill job openings. Many of those employers have agreed to serve as referral sources, and were very positive in their appraisal of older employees.

Since we are still considerably short of our goal of 100 older workers, we are asking that you please continue to refer older persons hired or placed into new jobs until further notice. WE NEED YOUR CONTINUED COOPERATION if we are to reach our goal.

Also, we are now accepting persons aged 50 or older who begin new jobs with/through your organization.

If you have any questions or suggestions about our project, please do not hesitate to call either of us. We really want to hear from you if you have any comments that would be helpful to us.

Finally, in case you have lost or misplaced our Referral Forms, we have enclosed several additional copies of all materials. If you want stamped, self-addressed envelopes,. please call Carol Hayden at 780-4430. Please also share this update with anyone else in your organization who helps older workers find new jobs.

Thanks again for your continued cooperation during our year-long Older Worker Project. Best wishes for a pleasant summer.

Public Policy and Management Program

UNIVERSITY OF SOUTHERN MAINE

Human Services Development
Institute

96 Falmouth Street
Portland, Maine 04103
207/780-4430

November 7, 1988

Dear Referral Source:

All of the initial surveys have been completed for the Older Worker Project. We interviewed a total of 103 persons in Maine, and nearly one hundred in Connecticut. We are now in the process of conducting follow-up surveys to find out how well their new jobs have worked out. Your assistance in meeting our goal in Maine is greatly appreciated.

We have begun analyzing the results of our interviews. Final results will be available in April 1989. An executive summary of the Older Worker Project will be forwarded to you at that time.

Again, thank you for your cooperation. Your referrals have assisted us in reaching our sample quota and we look forward to sharing results with you.

Sincerely,

Michael Brady

Michael Brady
Principal Investigator

Richard Fortinsky

Richard Fortinsky
Project Director

Public Policy and Management Program

# OLDER WORKER PROJECT

## Referral Source
## Telephone Survey Coversheet

| Phone Number | Date | Time | Interviewer | Disposition |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

CONTACT PERSON ____________________

ORGANIZATION NAME ____________________

TOWN ____________________

NUMBER OF REFERRALS ____________________

# OLDER WORKER PROJECT REFERRAL SOURCE

## TELEPHONE SURVEY

Hello, my name is ____________________________. I'm calling from the University of Southern Maine to follow up on some materials we sent to you on acting as a referral source for our Older Worker project. Do you remember that information?

I'd like to take just a few minutes of your time to find out how you've found the materials we sent to you.

1. Please tell me if you agree or disagree with the following statements as to why your participation in this referral process has not been that successful for you:

   a. You have very few older workers come through your doors.

   __ AGREE __ DISAGREE
   ↓
   If "agree" specify approximate monthly number _______.

   b. You have a fair to large number of older workers but they resist the idea of participating in a research study.

   __ AGREE __ DISAGREE

   c. You do not speak with older workers about the project.

   __ AGREE __ DISAGREE

d. You speak with older workers about the project and give them the forms but get the sense that they do not mail them in.

__ AGREE __ DISAGREE

e. Are there any other reasons why you have only been able to refer a small number of older workers or none at all to us?

__ YES __ NO → GO TO Q2.

f. What are those reasons?

2. Generally speaking, how important do you feel the Older Worker Project is?

3. Do you feel you have enough understanding of this project to inform Older Workers you come into contact with (your clients) what the project is about?

4. Have you been able to fit this into your referral/hiring/training process?

5. Approximately how many older workers have you been able to refer to us?

# APPENDIX 3

## T1 and T2 Interview Schedules

Resp. #: ____________

# HUMAN SERVICES DEVELOPMENT INSTITUTE
## OLDER WORKER PROJECT
## INITIAL SURVEY — (TIME 1)

ENTER INITIALS

____ Logged
____ Edited
____ Coded
____ Check-coded
____ Verified/ Validated

RESPONDENT NAME: ______________________________

TELEPHONE #: __________________

BEST TIME TO CALL: ____________________

DATE STARTED NEW JOB: __________________

CALL RECORD

| Interviewer | Day of Week | Call Date | Call Time | Disposition | Call Number |
|---|---|---|---|---|---|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

INTRODUCTION

Hello, may I please speak to ____________________________________.

I'm __________________________ from the University of Southern Maine (from the University of Hartford).

Mr/s. __________________________ of the ________________________________ has given us your name as a person who has recently started a new job. Is that correct?

IF YES ↓

IF NO ⟶ THANK R; TERMINATE INTERVIEW.

As Mr/s. ______________________ may have told you, we are conducting a survey of older persons who have started a new job. The results of the study will provide very important information for employers, job training organizations, and older persons looking for work. First, it's important that you know that I'm asking you questions off a printed questionnaire. Even though some of the questions may not apply to you, I'll need to ask them all exactly as they are written anyway. It will be helpful to me if you will think carefully about each question because it's important for me to get as much detail as possible. For our part, we'll keep all the information you give confidential.

ENTER TIME NOW: ______________

RESP #.

( 1 - 3 )

1. I'm going to ask you a number of questions about paid work in general. In general, to what extent does having a job mean more to you than just money--does it mean a great deal, a fair amount, some, just a little or nothing at all?

| | |
|---|---|
| GREAT DEAL | (4) - 1 |
| A FAIR AMOUNT | 2 |
| SOMEWHAT | 3 |
| JUST A LITTLE | 4 |
| NOT AT ALL | 5 |
| DK | 8 |
| NA | 9 |

2. How important is work to you as part of your daily life--is it extremely important, very important, somewhat important, slightly important or not at all important?

| | |
|---|---|
| EXTREMELY IMPORTANT | (5) - 1 |
| VERY IMPORTANT | 2 |
| SOMEWHAT IMPORTANT | 3 |
| SLIGHTLY IMPORTANT | 4 |
| NOT AT ALL IMPORTANT | 5 |
| DK | 8 |
| NA | 9 |

INTERVIEWER NOTE: ROTATE ORDER, START AT RED STAR *

3. Now I am going to read a list of job characteristics. For each one I'd like you to tell me how important it is in any job--not just your present job. First . . .

| | | VI | SI | NVI | NAA | DK | NA |
|---|---|---|---|---|---|---|---|
| a. How important is it that the work is interesting . . . is it very important, somewhat important, not very important, or not at all important? | (6) | 1 | 2 | 3 | 4 | 8 | 9 |
| b. How important is it to have job security, is it very important, somewhat important, not very important, or not at all important? | (7) | 1 | 2 | 3 | 4 | 8 | 9 |
| c. . . . opportunities to learn new things-- . . . ? | (8) | 1 | 2 | 3 | 4 | 8 | 9 |
| d. . . . good wages-- . . . ? | (9) | 1 | 2 | 3 | 4 | 8 | 9 |

| | VI | SI | NVI | NAA | DK | NA |
|---|---|---|---|---|---|---|
| e. How important is it to have chances to make independent decisions-- . . . ? . . . . . . . . . . . | (10)<br>1 | 2 | 3 | 4 | 8 | 9 |
| f. . . . friendly co-workers-- . . . ? . . . . . . . . . . | (11)<br>1 | 2 | 3 | 4 | 8 | 9 |
| g. . . . medical insurance-- . . . ? . . . . . . . . . . . | (12)<br>1 | 2 | 3 | 4 | 8 | 9 |
| h. How important are good fringe benefits, are they very important, somewhat important, not very important, or not at all important? . . . . . . . . . . . . . . . . | (13)<br>1 | 2 | 3 | 4 | 8 | 9 |
| i. How important is a sense of accomplishment-- ? . . . . | (14)<br>1 | 2 | 3 | 4 | 8 | 9 |
| j. . . . flexibility in work hours-- . . . ? . . . . . . . | (15)<br>1 | 2 | 3 | 4 | 8 | 9 |
| k. . . . to use skills developed during your previous jobs-- . . . ? . . . . . . . . . . . . . . . . . . . . . | (16)<br>1 | 2 | 3 | 4 | 8 | 9 |
| l. . . . that the job is located close to where you live-- . . . ? . . . . . . . . . . . . . . . . . . . . . | (17)<br>1 | 2 | 3 | 4 | 8 | 9 |
| m. . . . are comfortable working conditions-- . . . ? . . | (18)<br>1 | 2 | 3 | 4 | 8 | 9 |
| n. How important is it to have a supervisor close to your own age-- . . . ? . . . . . . . . . . . . . . . . | (19)<br>1 | 2 | 3 | 4 | 8 | 9 |
| o. How important is it to have opportunities for promotion or advancement-- . . . ? . . . . . . . . . . | (20)<br>1 | 2 | 3 | 4 | 8 | 9 |
| p. . . . the way you feel about the company, organization or business-- . . . ? . . . . . . . . . . | (21)<br>1 | 2 | 3 | 4 | 8 | 9 |

GO BACK

3q. Are there any other factors or characteristics which I have not mentioned that are important to you in a job?

| | | |
|---|---|---|
| YES . . . . . . . . . . . . . . . . | (22)-1 | |
| NO . . . . . . . . . . . . . . . . | . . 5 | GO TO |
| DK . . . . . . . . . . . . . . . . | . . 8 | Q4, |
| NA . . . . . . . . . . . . . . . . | . . 9 | p.4 |

What are those factors?

______________________________ ___ ___

______________________________ (23 - 24)

| | |
|---|---|
| DK . . . . . . . . . . . . . . . . | . . . 98 |
| NA . . . . . . . . . . . . . . . . | . . . 99 |
| INAP (Coded 5, 8 or 9 in Q3q) . . | . . . 00 |

4. When did you start your present job?
(What date was that?)

| | |
|---|---|
| / /88<br>MONTH / DAY /YEAR | __ __/__ __/ 88<br>(25 -- 30) |
| DK . . . . . . . . . . . . . . . . . . | . . 999998 |
| NA . . . . . . . . . . . . . . . . . . | . . 999999 |

5. How important was each of the following when you started your search for employment?

| | Col. | VI | SI | NVI | NAA | DK | NA |
|---|---|---|---|---|---|---|---|
| a. How important was additional income--was it very important, somewhat important, not very important, or not at all important? . . . . . . . . . . . . . . . . . . . . . . | (31) | 1 | 2 | 3 | 4 | 8 | 9 |
| b. How important was obtaining medical insurance--was it very important, somewhat important, not very important, or not at all important? . . . . . . . . . . . . . . . . . . | (32) | 1 | 2 | 3 | 4 | 8 | 9 |
| c. . . . wanting fringe benefits-- . . . ? . . . . . . . . | (33) | 1 | 2 | 3 | 4 | 8 | 9 |
| d. . . . needing to feel useful-- . . . ? . . . . . . . . . | (34) | 1 | 2 | 3 | 4 | 8 | 9 |
| e. How important was wanting a challenge--was it very important, somewhat important, not very important, or not at all important? . . . . . . . . . . . . . . . . . | (35) | 1 | 2 | 3 | 4 | 8 | 9 |
| f. How important was meeting people-- . . . ? . . . . . . . | (36) | 1 | 2 | 3 | 4 | 8 | 9 |
| g. . . . wanting to do something different from your previous work-- . . . ? . . . . . . . . . . . . . . . | (37) | 1 | 2 | 3 | 4 | 8 | 9 |

5h. Are there any other considerations that were important in your search for a job?

| | | |
|---|---|---|
| YES . . . . . . . . . . . . . . . . | (38) - 1 | |
| NO . . . . . . . . . . . . . . . . | . . 5 | GO TO Q6, p.5 |
| DK . . . . . . . . . . . . . . . . | . . 8 | |
| NA . . . . . . . . . . . . . . . . | . . 9 | |

What were those considerations?

______________________________________________

______________________________________________

| | |
|---|---|
| | (39 -- 40) |
| DK . . . . . | . . . 98 |
| NA . . . . . | . . . 99 |
| INAP. . . . . | . . . 00 |

INTERVIEWER NOTE: ASK Q6 ONLY IF R VOLUNTEERS THAT S/HE HAS LEFT JOB STARTED SINCE JAN. 1, 1988, OTHERWISE GO TO Q7

6. Why did you leave that job?

____________________________________________

____________________________________________

| | |
|---|---|
| | ($\overline{41}$ -- $\overline{42}$) |
| DK . . . . . . . . . . . . . . | . . . 98 |
| NA . . . . . . . . . . . . . . | . . . 99 |
| INAP (CURRENTLY WORKING) . . | . . . 00 |

Was there any other reason?

____________________________________________

____________________________________________

| | |
|---|---|
| | ($\overline{43}$ -- $\overline{44}$) |
| DK . . . . . . . . . . . . . . | . . . 98 |
| NA . . . . . . . . . . . . . . | . . . 99 |
| INAP (CURRENTLY WORKING) . . | . . . 00 |

7. How close is the job you have now to what you were looking for--was it exactly the same, almost the same, somewhat different, very different, completely different?

| | |
|---|---|
| EXACTLY THE SAME . . . . . . . . | (45) - 1 |
| ALMOST THE SAME . . . . . . . . . | . . . . 2 |
| SOMEWHAT DIFFERENT . . . . . . . | . . . . 3 |
| VERY DIFFERENT . . . . . . . . . | . . . . 4 |
| COMPLETELY DIFFERENT . . . . . . | . . . . 5 |
| DK . . . . . . . . . . . . . . . | . . . . 8 |
| NA . . . . . . . . . . . . . . . | . . . . 9 |

8a. What is your job title or what sort of work do you do on your present job?

______________________________

______________________________

8b. Tell me a little more about what you do on your job.

______________________________

______________________________

(46 -- 47)

DK . . . . . . . . . 98

NA . . . . . . . . . 99

9a. What kind of business or industry is that?

______________________________

______________________________

9b. What do they make or do at the place where you work?

______________________________

______________________________

(48 -- 49)

DK . . . . . . . . . 98

NA . . . . . . . . . 99

9c. About how many hours do you work on your job in an average week, including both paid and unpaid overtime?

NUMBER OF HOURS: ______________

(50 -- 51)

DK . . . . . . . . . 98

NA . . . . . . . . . 99

(Leave Columns 52--54 blank)

ASK IN CT. - DO NOT ASK IN ME.

10. Did you obtain this job by yourself or did you make use of an employment assistance program?

| | |
|---|---|
| BY SELF | (55)-1-GO TO Q14 |
| EMPLOYMENT ASSISTANCE PROGRAM | 2 |
| BOTH (Volunteered) | 3 |
| DK | 8 GO TO Q 14 |
| NA | 9 |
| INAP (Maine Resident) | 0 - GO TO Q16, p.8 |

11. Which employment assistance program did you use?

______________________________ (56 -- 57)

______________________________

| | |
|---|---|
| DK | 98 |
| NA | 99 |
| INAP (Coded 1, 8, 9 or 0 in Q10) | 00 |

12. How helpful was the program? Would you say it was very helpful, somewhat helpful, not very helpful or not at all helpful?

| | |
|---|---|
| VERY HELPFUL | (58) - 1 |
| SOMEWHAT HELPFUL | 2 |
| NOT VERY HELPFUL | 3 |
| NOT AT ALL HELPFUL | 4 |
| DK | 8 |
| NA | 9 |
| INAP (Coded 1, 8, 9 0r 0 in Q10) | 0 |

13. In what way was the program helpful?

______________________________ (59 -- 60)

______________________________

| | |
|---|---|
| DK | 98 |
| NA | 99 |
| INAP (Coded 1, 8, 9 or 0 in Q10) | 00 |

14. Did you receive any training before taking this job?

| | |
|---|---|
| YES | (61) - 1 |
| NO | 5 |
| DK | 8 |
| NA | 9 |
| INAP (Coded 1, 8, 9 or 0 in Q10) | 0 |

15. Do you think this training will help you do this job?

| | |
|---|---|
| YES | (62) - 1 |
| NO | 5 |
| DK | 8 |
| NA | 9 |
| INAP (Coded 1, 8, 9 or 0 in Q10) | 0 |

16. Even though you have been on your job for a short time, overall, how satisfied are you with your job? Would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied or very dissatisfied?

| | |
|---|---|
| VERY SATISFIED . . . . . . . . . . | (63) - 1 |
| SOMEWHAT SATISFIED . . . . . . . | . . . . . 2 |
| SOMEWHAT DISSATISFIED . . . . . . . | . . . . . 3 |
| VERY DISSATISFIED . . . . . . . . | . . . . . 4 |
| DK . . . . . . . . . . . . . . . . | . . . . . 8 |
| NA . . . . . . . . . . . . . . . . | . . . . . 9 |

a. And why are you (REPEAT RESPONSE TO Q10) with your present job?

________________________________________

________________________________________

| | |
|---|---|
| | (64 -- 65) |
| DK . . . . . . | . . . 98 |
| NA . . . . . . | . . . 99 |

17. Not counting your current job, when did you last work for pay?

| | | |
|---|---|---|
| _____/_____<br>MONTH /YEAR | ___/___<br>(66 -- 69) | |
| DK . . . . . . . . . . . . . . . . | . . 9998 | GO TO Q25, p.10 |
| NA . . . . . . . . . . . . . . . . | . . 9999 | |
| INAP (NEVER WORKED FOR PAY) . . . | . . 0000 | |

INTERVIEWER NOTE: IF R NEVER WORKED FOR PAY, GO TO Q25, p.10

18. Thinking back over the years that you worked for pay, what was your primary or main job or what sort of work did you do?

________________________________________

________________________________________

19. Tell me a little more about what you did on your job.

________________________________________

________________________________________

| | |
|---|---|
| | (70 -- 71) |
| DK . . . . . . . . . . . . . . . . | . . . 98 |
| NA . . . . . . . . . . . . . . . . | . . . 99 |
| INAP (NEVER WORKED FOR PAY) . . . | . . . 00 |

20. What kind of business or industry was that?

________________________________________

________________________________________

21. What did they make or do at the place where you worked?

________________________________________

________________________________________

| | |
|---|---|
| | (72 -- 73) |
| DK . . . . . . . . . . . . . | . . . 98 |
| NA . . . . . . . . . . . . . | . . . 99 |
| INAP (NEVER WORKED FOR PAY) | . . . 00 |

22. How many years did you work in your primary or main job?

| | |
|---|---|
| NUMBER OF YEARS: __________ | (74 -- 75) |
| DK . . . . . . . . . . . . . | . . . 98 |
| NA . . . . . . . . . . . . . | . . . 99 |
| INAP (NEVER WORKED FOR PAY) | . . . 00 |

23. Why did you leave that job?

________________________________________

________________________________________

| | |
|---|---|
| | (76 -- 77) |
| DK . . . . . . . . . . . . . | . . . 98 |
| NA . . . . . . . . . . . . . | . . . 99 |
| INAP (NEVER WORKED FOR PAY) | . . . 00 |

INTERVIEWER NOTE:
ROTATE ORDER,
START AT RED STAR *

24. I'd like you to think about the job we have just been talking about, that is your primary or main job, and tell me if you strongly agree, agree, disagree or strongly disagree with the following statements:

| | | SA | A | D | SD | DK | NA | INAP |
|---|---|---|---|---|---|---|---|---|
| a. I had the freedom to decide what I did with my job. . . . . . . . . . . . . . . . . . . . . . . . | (78) | 1 | 2 | 3 | 4 | 8 | 9 | 0 |
| b. My job required that I keep learning new things. . . . . . . . . . . . . . . . . . . . . . . . | (79) | 1 | 2 | 3 | 4 | 8 | 9 | 0 |
| c. My job let me use my skills and abilities. . . . . . . . . . . . . . . . . . . . . . . . . | (80) | 1 | 2 | 3 | 4 | 8 | 9 | 0 |
| d. My job required that I do the same things over and over again. . . . . . . . . . . . . . . . . . . . | (81) | 1 | 2 | 3 | 4 | 8 | 9 | 0 |
| e. It was my own responsibility to decide how my job got done. . . . . . . . . . . . . . . . . . . . . . | (82) | 1 | 2 | 3 | 4 | 8 | 9 | 0 |
| f. My job required a high level of skill. . . . . . . . . . . . . . . . . . . . . . . . . | (83) | 1 | 2 | 3 | 4 | 8 | 9 | 0 |
| g. I could tell what impact my work had on the product or service. . . . . . . . . . . . . . . . | (84) | 1 | 2 | 3 | 4 | 8 | 9 | 0 |

GO TO Q26, p.10

INTERVIEWER NOTE: IF R NEVER WORKED FOR PAY,
ASK Q25

25. How did you spend the years until you started your current job. Were you a homemaker or what?

| | |
|---|---|
| HOMEMAKER . . . . . . . . . . . . . . . . . . | (85) - 1 |
| OTHER (PLEASE SPECIFY) ____________ | . . . 7 |
| INAP(WORKED FOR PAY IN Q17) . . . . . . . . . . . . | . . . 0 |

26. Have you ever done volunteer or unpaid service work?

| | | |
|---|---|---|
| YES . . . . . . . . . . . . . . . . | (86) - 1 | |
| NO . . . . . . . . . . . . . . . . | . . . 5 | GO TO Q29, p.11 |
| DK . . . . . . . . . . . . . . . . | . . . 8 | |
| NA . . . . . . . . . . . . . . . . | . . . 9 | |

INTERVIEWER NOTE: IF R HAS DONE
VOLUNTEER WORK, ASK Q26a-Q28

26a. In total, how many years have you done volunteer or unpaid service work?

| | | |
|---|---|---|
| NUMBER OF YEARS: ____________ | (87 -- 88) | |
| DK . . . . . . . . . . . . . . . . | . . 98 | GO TO Q29, p.11 |
| NA . . . . . . . . . . . . . . . . | . . 99 | |
| INAP (CODED 5, 8, or 9 in Q26) . | . . 00 | |

| | | | |
|---|---|---|---|
| 27a. What kind of organization or association was that volunteer work with? | 28a. What type of work did you do? | | |
| ____________ | ____________ | (89 - 90) | (95 - 96) |
| ____________ | ____________ | | |
| DK | DK . . . . . . . . . . . . . | . . 98 | . . 98 |
| NA | NA . . . . . . . . . . . . . | . . 99 | . . 99 |
| INAP(CODED 5, 8 or 9 in Q26) | INAP(CODED 5, 8 or 9 in Q26) | . . 00 | . . 00 |
| 27b. Any others? | 28b. What type of work did you do? | | |
| ____________ | ____________ | (91 - 92) | (97 - 98) |
| ____________ | ____________ | | |
| DK | DK . . . . . . . . . . . . . | . . 98 | . . 98 |
| NA | NA . . . . . . . . . . . . . | . . 99 | . . 99 |
| INAP(CODED 5, 8 or 9 in Q26) | INAP(CODED 5, 8 or 9 in Q26) | . . 00 | . . 00 |
| 27c. ____________ | 28c. ____________ | (93 - 94) | (99 -100) |
| ____________ | ____________ | | |
| DK | DK . . . . . . . . . . . . . | . . 98 | . . 98 |
| NA | NA . . . . . . . . . . . . . | . . 99 | . . 99 |
| INAP(CODED 5, 8 or 9 in Q26) | INAP(CODED 5, 8 or 9 in Q26) | . . 00 | . . 00 |

In order to describe the types of people we talk to, we need to get some background information.

I'm going to ask you a few questions about you and any other person living with you.

29. First, would you please tell me the age of each person in your household including yourself, from the oldest person to the youngest child and also how each person is related to you.

| Person | Age | Sex | Relationship to R |
|---|---|---|---|
| No. # | 00=0-6 Mos.<br>97=97-Older | M - F | 0=R<br>1=Spouse<br>2=Child<br>3=Stepchild<br>4=Grandchild<br>5=Parent<br>6=Sibling<br>7=Other Relative<br>8=Not Related |
| 1 | (101-102) | 1 5<br>(103) | (104) |
| 2 | (105-106) | 1 5<br>(107) | (108) |
| 3 | (109-110) | 1 5<br>(111) | (112) |
| 4 | (113-114) | 1 5<br>(115) | (116) |
| 5 | (117-118) | 1 5<br>(119) | (120) |
| 6 | (121-122) | 1 5<br>(123) | (124) |
| 7 | (125-126) | 1 5<br>(127) | (128) |
| 8 | (129-130) | 1 5<br>(131) | (132) |

(Leave Columns
133-137 blank)

30. Now I have just a few final questions about yourself. Compared to other people your age, would you say that overall your health is excellent, good, fair or poor?

| | |
|---|---|
| EXCELLENT | (138)- 1 |
| GOOD | . . . 2 |
| FAIR | . . . 3 |
| POOR | . . . 4 |
| DK | . . . 8 |
| NA | . . . 9 |

31. Do you have a health or physical problem which limits the kind or the amount of work you can do?

| | | |
|---|---|---|
| YES | (139)- 1 | |
| NO | . . . 5 | GO TO Q 33 |
| DK | . . . 8 | |
| NA | . . . 9 | |

32. What health problems caused that?

______________________________________________ __ __

______________________________________________ (140--141)

| | |
|---|---|
| DK | . . . 98 |
| NA | . . . 99 |
| INAP (Code 5, 8 or 9 in Q31) | . . . 00 |

33. How satisfied are you with your life--would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied or very dissatisfied?

| | |
|---|---|
| VERY SATISFIED | (142)- 1 |
| SOMEWHAT SATISFIED | . . . 2 |
| SOMEWHAT DISSATISFIED | . . . 3 |
| VERY DISSATISFIED | . . . 4 |
| DK | . . . 8 |
| NA | . . . 9 |

34. In general, how much satisfaction in your life would you say comes from working at your present job--would you say no satisfaction, just a little satisfaction, some satisfaction quite a bit of satisfaction, or a great deal of satisfaction?

| | |
|---|---|
| NO SATISFACTION | (143)- 1 |
| JUST A LITTLE SATISFACTION | . . . 2 |
| SOME SATISFACTION | . . . 3 |
| QUITE A BIT OF SATISFACTION | . . . 4 |
| A GREAT DEAL OF SATISFACTION | . . . 5 |
| DK | . . . 8 |
| NA | . . . 9 |

35. What is the last grade in school you have completed so far?

| | |
|---|---|
| LESS THAN EIGHTH GRADE | (144)- 1 |
| EIGHTH GRADE | 2 |
| NINTH - ELEVENTH GRADE | 3 |
| GRADE TWELVE | 4 |
| VOCATIONAL OR OTHER NON-COLLEGE POSTSECONDARY TRAINING | 5 |
| ONE - THREE YEARS OF COLLEGE | 6 |
| GRADUATED FROM COLLEGE OR HIGHER | 7 |
| DK | 8 |
| NA | 9 |

36. Do you consider yourself to be a member of any ethnic group or nationality, such as French, French-Canadian, Italian, Irish, or some other?

YES (RECORD EXACT RESPONSE)____________________ . . .

_______________________________________ . . .

| | |
|---|---|
| | (145-146) |
| NO - NO OTHER NATIONALITY/ETHNIC GROUP | 05 |
| DK | 98 |
| NA | 99 |

37. What race do you consider yourself to be? (DO NOT READ RESPONSES)

| | |
|---|---|
| WHITE (CAUCASIAN) | (147)- 01 |
| BLACK OR NEGRO. | 02 |
| JAPANESE | 03 |
| CHINESE | 04 |
| FILIPINO | 05 |
| HISPANIC | 06 |
| KOREAN | 07 |
| VIETNAMESE | 08 |
| INDIAN (AMERICAN) | 09 |
| OTHER (PLEASE SPECIFY__________) | 97 |
| DK | 98 |
| NA | 99 |

38. What town do you live in?

________________________________ (148 - 152)

EXPLAIN IF NECESSARY:
In this study, we need to talk with people in all income groups to make sure the total group we talk to represents other people like yourselves. To do this, I'll ask you about ranges of income so that you won't have to reveal your exact income, but it is important that you choose the right category.

39\. What was the total household income from all sources before taxes for 1987, for all household members combined? Was it $15,000 or more or was it less than that? (Include all people living in R's household.)

LESS THAN $15,000 → ASK:

Was it over $10,000?

YES . . . . . (153-154) - 04
NO . . . . .

Was it over $7,000?

YES . . . . . . . . . . . . 03
NO . . . . .

Was it over $5,000?

YES . . . . . . . . . . . . 02
NO . . . . . . . . . . . . 01

DK . . . . . . . . . . . . 98
NA . . . . . . . . . . . . 99

$15,000 OR MORE → ASK:

Was it under $20,000?

YES . . . . . . . . . . . . 05
NO . . . . .

Was it under $25,000?

YES . . . . . . . . . . . . 06
NO . . . . .

Was it under $30,000?

YES . . . . . . . . . . . . 07
NO . . . . . . . . . . . . 08

We would like to interview you again in the coming months. Would you please give me the name, address and telephone number of two people who are likely to know where you are in case you move?

NAME: ______________________________
ADDRESS: ____________________________
PHONE NUMBER: _______________________

NAME: ______________________________
ADDRESS: ____________________________
PHONE NUMBER: _______________________

Thank you very much for participating in the study. Your answers have been very helpful. Do you have any comments that you would like to add?

EXACT TIME NOW: ____________

**DO NOT FORGET TO ENTER INTERVIEWER RECORD!**

| | |
|---|---|
| **INTERVIEWER/EDITOR RECORD:** | (155-157) R.ID |
| SEX OF RESPONDENT: MALE . . . . . . . . . . . . . . . | (158) - 1 |
| FEMALE . . . . . . . . . . . . . . . | . . . . 5 |
| INTERVIEWER #: . . . . . . . . . . . . . . . . . . . . . . . . . | (159-160) |
| LENGTH OF INTERVIEW (MINUTES): . . . . . . . . . . . . . . . | (161-162) |
| DATE OF COMPLETION: . . . . . . . . . . . . . . . . . . . . | ___/___/___<br>(163 - 168) |
| TELEPHONE EXCHANGE: . . . . . . . . . . . . . . . . . . . . | (169 - 171) |
| REFERRAL SOURCE: . . . . . . . . . . . . . . . . . . . . . . . | ___ ___ ___<br>(172 - 174) |
| R ID IN HOUSEHOLD: | (175-176) |

01 = Husband w/wife

02 = Wife w/husband

03 = Single male (alone)

04 = Single female (alone)

05 = Male parent w/adult child (ren)

06 = Female parent w/adult child(ren)

07 = Male adult child w/parents

08 = Female adult child w/parents

09 = Husband/wife & child(ren)

10 = Wife/husband & child(ren)

11 = Roommate of others

97 = Other (please specify) ______________________

| | |
|---|---|
| **CODER/EDITOR RECORD:** | |
| TOTAL # OF CALLS ON INTERVIEW: . . . . . . . . . . . . . . . | (177 - 179) |
| # OF #'S ASSIGNED: . . . . . . . . . . . . . . . . . . . . . . | (180 - 182) |
| # OF NA/BUSY REASSIGNED: . . . . . . . . . . . . . . . . . . | (183-184) |
| # OF NIS: . . . . . . . . . . . . . . . . . . . . . . . . . . | (185-186) |
| # OF REFUSALS: . . . . . . . . . . . . . . . . . . . . . . . . | (187-188) |
| # OF TERMINATIONS: . . . . . . . . . . . . . . . . . . . . . . | (189-190) |
| TOTAL # OF INELIGIBLES: . . . . . . . . . . . . . . . . . . . | (191-192) |
| GEOCODE: . . . . . . . . . . . . . . . . . . . . . . . . . . | (193 — 197) |
| CODER #: . . . . . . . . . . . . . . . . . . . . . . . . . . | (198) |

RESP. # ____________

# HUMAN SERVICES DEVELOPMENT INSTITUTE
## OLDER WORKER PROJECT
## FOLLOW-UP SURVEY — (TIME 2)

ENTER INITIALS

____ Logged
____ Edited
____ Coded
____ Check-coded
____ Verified/Validated
____ Entered on CATI

RESPONDENT NAME: ______________________________

TELEPHONE #: __________________

BEST TIME TO CALL: ____________________

DATE OF INITIAL INTERVIEW: _____________

DATE STARTED JOB: ____________________

### CALL RECORD

| Interviewer | Day of Week | Call Date | Call Time | Disposition | Call Number |
|---|---|---|---|---|---|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

### INTRODUCTION

Hello, may I please speak to ____________________________________.

I'm __________________________ from the University of Southern Maine
(from the University of Hartford).

A few months ago we called you to ask about the job you received through

______________________________. We're now following up to see how the job has worked out for you. Your answers to these questions will help other workers to get jobs. It's important that you know that I'm asking you questions off a printed questionnaire. Even though some of my questions may not apply to you, I'll need to ask them all exactly as they are written anyway. It will be helpful to me if you will think carefully about each question because it's important for me to get as much detail as possible. For our part, we'll keep all the information you give confidential.

ENTER TIME NOW: ________________

RESP #. _ _ _

1. First, I'm going to ask you a couple of questions about paid work in general. In general, to what extent does having a job mean more to you than just money--does it mean a great deal, a fair amount, some, just a little or nothing at all?

| | |
|---|---|
| GREAT DEAL . . . . . . . . . | . . . . . 1 |
| A FAIR AMOUNT . . . . . . . | . . . . . 2 |
| SOMEWHAT . . . . . . . . . | . . . . . 3 |
| JUST A LITTLE . . . . . . . | . . . . . 4 |
| NOT AT ALL . . . . . . . . | . . . . . 5 |
| DK . . . . . . . . . . . . | . . . . . 8 |
| NA . . . . . . . . . . . . | . . . . . 9 |

2. How important is work to you as part of your daily life--is it extremely important, very important, somewhat important, slightly important or not at all important?

| | |
|---|---|
| EXTREMELY IMPORTANT . . . . | . . . . . 1 |
| VERY IMPORTANT . . . . . . | . . . . . 2 |
| SOMEWHAT IMPORTANT . . . . | . . . . . 3 |
| SLIGHTLY IMPORTANT . . . . | . . . . . 4 |
| NOT AT ALL IMPORTANT . . . | . . . . . 5 |
| DK . . . . . . . . . . . . | . . . . . 8 |
| NA . . . . . . . . . . . . | . . . . . 9 |

3. Are you still with the same company, business or organization you were with when we last spoke with you?

| | |
|---|---|
| YES . . . . . . . . . . . . | . . . . . 1 |
| NO . . . . . . . . . . . . | . . . . . 5 |
| DK . . . . . . . . . . . . | . . . . . 8 |
| NA . . . . . . . . . . . . | . . . . . 9 |

4. Are you still working at the same job you started on _______________? (INTERVIEWER: FILL IN DATE)

| | |
|---|---|
| YES . . . . . . . . . . . . | . . 1→ GO TO Q12,P5 |
| NO . . . . . . . . . . . . | . . 5 |
| DK . . . . . . . . . . . . | . . 8 |
| NA . . . . . . . . . . . . | . . 9 |
| INAP . . . . . . . . . . . | . . 0 |

5. Next, I am going to read you a list of reasons why you may have left that job. For each one I'd like you to tell me if it was one of the reasons why you left that job.

> INTERVIEWER NOTE: ROTATE ORDER, START AT RED STAR *

| | | YES | NO | DK | NA | INAP |
|---|---|---|---|---|---|---|
| a. | Did you leave that job because it was only temporary? . . | 1 | 5 | 8 | 9 | 0 |
| b. | Did you leave that job due to your own health? . . . . . | 1 | 5 | 8 | 9 | 0 |
| c. | . . . because of a family member's health? . . . . . . . . | 1 | 5 | 8 | 9 | 0 |
| d. | Did you leave that job because of family reasons? . . . . | 1 | 5 | 8 | 9 | 0 |
| e. | . . . because the place where you worked no longer exists (has gone out of business)? . . . . . . . . . . . | 1 | 5 | 8 | 9 | 0 |
| f. | . . . because the company no longer needed you? . . . . . | 1 | 5 | 8 | 9 | 0 |
| g. | Did you leave that job because it was too hard to get to? . . . . . . . . . . . . . . . . . . . . . . . . . . | 1 | 5 | 8 | 9 | 0 |
| h. | . . . because you were fired? . . . . . . . . . . . . . . | 1 | 5 | 8 | 9 | 0 |
| i. | Did you leave that job because you didn't like it? . . . | 1 | 5 | 8 | 9 | 0 |

5, 8, 9, 0 → GO TO Q5j

1 → What was it that you didn't like about the job?

________________________________________________ ___ ___

________________________________________________

| | |
|---|---|
| DK . . . . . . . . . . . . . . . . | . . . 98 |
| NA . . . . . . . . . . . . . . . . | . . . 99 |
| INAP . . . . . . . . . . . . . . . | . . . 00 |

j. Were there any other reasons why you left that job?

| | | |
|---|---|---|
| YES . . . . . . . . . . . . . . . | . 1 | |
| NO . . . . . . . . . . . . . . . | . 5 | GO TO IWER CHECK-POINT FOR Q6, P4 |
| DK . . . . . . . . . . . . . . . | . 8 | |
| NA . . . . . . . . . . . . . . . | . 9 | |
| INAP . . . . . . . . . . . . . . | . 0 | |

k. What were those reasons?

________________________________________________ ___ ___

________________________________________________ ___ ___

IWER CHECKPOINT FOR Q6:
☐ ONE REASON GIVEN IN Q5a-5j, THEN GO TO Q7.
☐ MORE THAN ONE REASON IN Q5a-5j, THEN ASK Q6.

6. You said the reasons you left the job we have been talking about were (LIST REASONS FROM Q5a-5k). Would you please tell me which was the most important reason?

| | |
|---|---|
| a. JOB WAS ONLY TEMPORARY | 01 |
| b. DUE TO R'S HEALTH | 02 |
| c. BECAUSE OF FAMILY REASON | 03 |
| d. BECAUSE OF A FAMILY MEMBER'S HEALTH | 04 |
| e. BECAUSE THE PLACE WHERE R WORKED NO LONGER EXISTS | 05 |
| f. BECAUSE THE COMPANY NO LONGER NEEDED R (R WAS LAID OFF) | 06 |
| g. R DIDN'T LIKE JOB | 07 |
| h. R WAS FIRED | 08 |
| i. OTHER REASON FROM Q5i - PLEASE SPECIFY HERE: ______________________ ______________________ | 97 |
| j. DK | 98 |
| k. NA | 99 |
| l. INAP | 00 |

7. Are you currently employed at a new job?

| | | |
|---|---|---|
| YES | 1 | |
| NO | 5 | GO TO Q9, p5. |
| DK | 8 | |
| NA | 9 | |
| INAP. | 0 | |

8a. What is your job title or what sort of work do you do on your present job?

______________________

______________________

8b. Tell me a little more about what you do on your job.

____________________________________ __ __

____________________________________

| | | |
|---|---|---|
| DK | 98 | GO TO Q12 |
| NA | 99 | |
| INAP | 00 | |

9. Are you looking for another job now?

| | | |
|---|---|---|
| YES | 1 | |
| NO | 5 | GO TO Q12 |
| DK | 8 | |
| NA | 9 | |
| INAP. | 0 | |

10. What kind of work are you looking for?

____________________________________ __ __

____________________________________

| | |
|---|---|
| DK | 98 |
| NA | 99 |
| INAP | 00 |

11. Could you tell me a little more about the kind of work you are looking for?

____________________________________ __ __

____________________________________

| | |
|---|---|
| DK | 98 |
| NA | 99 |
| INAP | 00 |

12. For the following questions, please think about your current job (the job you had the last time we spoke), that is when you worked as ____________________
(INTERVIEWER FILL IN)
Overall, how satisfied would you say you are (were) with the job you have now (had)? Would you say you are (were) very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied?

| | |
|---|---|
| VERY SATISFIED | 1 |
| SOMEWHAT SATISFIED | 2 |
| SOMEWHAT DISSATISFIED | 3 |
| VERY DISSATISFIED | 4 |
| DK | 8 |
| NA | 9 |

13. And why are you (REPEAT RESPONSE TO Q12) with your present job (the job you had the last time we spoke with you)?

________________________________________ ___ ___

________________________________________

14. Would you recommend this (that) job to a friend?

| | |
|---|---|
| YES . . . . . . . . . . . . . . . | . . 1 |
| NO . . . . . . . . . . . . . . . | . . 5 |
| DK . . . . . . . . . . . . . . . | . . 8 |
| NA . . . . . . . . . . . . . . . | . . 9 |

15. If you knew before you started your (that) job what you know now, would you still have taken it?

| | |
|---|---|
| YES . . . . . . . . . . . . . . . . | . 1 → ASK Q16a |
| NO . . . . . . . . . . . . . . . . | . 5 → ASK Q16b |
| DK . . . . . . . . . . . . . . . . | . 8 → GO TO Q17 |
| NA . . . . . . . . . . . . . . . . | . 9 |

16a. IF YES TO Q15, Why would you have taken the job?

________________________________________ ___ ___

________________________________________

| | |
|---|---|
| DK . . . . . . . . . . . . . . . . | . . . 8 |
| NA . . . . . . . . . . . . . . . . | . . . 9 |
| INAP . . . . . . . . . . . . . . . | . . . 0 |

16b. IF NO TO Q15, Why wouldn't you have taken the job?

________________________________________ ___ ___

________________________________________

| | |
|---|---|
| DK . . . . . . . . . . . . . . . . | . . . 8 |
| NA . . . . . . . . . . . . . . . . | . . . 9 |
| INAP . . . . . . . . . . . . . . . | . . . 0 |

17. Thinking about the job we have just been talking about, that is your current job, (the job you had the last time we spoke) please tell me if you strongly agree, agree, disagree, or strongly disagree with the following statements:

| | SA | A | D | SD | DK | NA | INAP |
|---|---|---|---|---|---|---|---|
| a. I have (had) the freedom to decide what I do (did) with my job. | 1 | 2 | 3 | 4 | 8 | 9 | 0 |
| b. My job requires (required) that I keep (kept) learning new things. | 1 | 2 | 3 | 4 | 8 | 9 | 0 |
| c. My job lets (let) me use my skills and abilities. | 1 | 2 | 3 | 4 | 8 | 9 | 0 |
| d. My job requires (required) that I do (did) the same things over and over again. | 1 | 2 | 3 | 4 | 8 | 9 | 0 |

| | SA | A | D | SD | DK | NA | INAP |
|---|---|---|---|---|---|---|---|
| e. It is (was) my own responsibility to decide how my job gets (got) done. | 1 | 2 | 3 | 4 | 8 | 9 | 0 |
| f. My job requires (required) a high level of skill. | 1 | 2 | 3 | 4 | 8 | 9 | 0 |
| g. I can (could) tell what impact my work has (had) on the product or service. | 1 | 2 | 3 | 4 | 8 | 9 | 0 |
| h. My job is (was) closely supervised. | 1 | 2 | 3 | 4 | 8 | 9 | 0 |

18. How often do (did) you work extra time, even when it is not required of you--often, sometimes or never?

OFTEN . . . . . . . . . . . . . . . . . . . . 1
SOMETIMES . . . . . . . . . . . . . . . . . . 2
NEVER . . . . . . . . . . . . . . . . . . . . 3
DK . . . . . . . . . . . . . . . . . . . . . 8
NA . . . . . . . . . . . . . . . . . . . . . 9
INAP . . . . . . . . . . . . . . . . . . . . 0

19. How often does (did) time seem to drag for you when you are (were) working at your current job--often, sometimes or never?

OFTEN . . . . . . . . . . . . . . . . . . . . 1
SOMETIMES . . . . . . . . . . . . . . . . . . 2
NEVER . . . . . . . . . . . . . . . . . . . . 3
DK . . . . . . . . . . . . . . . . . . . . . 8
NA . . . . . . . . . . . . . . . . . . . . . 9
INAP . . . . . . . . . . . . . . . . . . . . 0

20. Is (Was) your supervisor older, younger or about the same age as you?

OLDER . . . . . . . . . . . . . . . . . . . . 1
YOUNGER . . . . . . . . . . . . . . . . . . . 2
ABOUT THE SAME . . . . . . . . . . . . . . . . 3
DK . . . . . . . . . . . . . . . . . . . . . 8
NA . . . . . . . . . . . . . . . . . . . . . 9
INAP . . . . . . . . . . . . . . . . . . . . 0

21. About how many hours do (did) you work on your job in an average week, including both paid and unpaid overtime?

NUMBER OF HOURS: ______________ ___ ___
DK . . . . . . . . . . . . . . . . . . . . . 98
NA . . . . . . . . . . . . . . . . . . . . . 99

22. How much are (were) you paid at your job? ASK ONLY IF NECESSARY: Is (was) that per hour, week or month?

| | |
|---|---|
| $__________per HOUR/WEEK/MONTH . . . . .<br>(INTERVIEWER CIRCLE ONE) . . . . | _ _ _ _ . _ _ |
| DK . . . . . . . . . . . . . . . . | 9 9 9 9 . 9 8 |
| NA . . . . . . . . . . . . . . . . | 9 9 9 9 . 9 9 |
| INAP . . . . . . . . . . . . . . . | 0 0 0 0 . 0 0 |

22a. INTERVIEWER CODE:

| | |
|---|---|
| HOUR . . . . . . . . . . . . . . . . . . | . . . 01 |
| WEEK . . . . . . . . . . . . . . . . . . | . . . 02 |
| MONTH . . . . . . . . . . . . . . . . . | . . . 03 |
| OTHER (PLEASE SPECIFY) ____________ | . . . 97 |
| DK . . . . . . . . . . . . . . . . . . . | . . . 98 |
| NA . . . . . . . . . . . . . . . . . . . | . . . 99 |
| INAP . . . . . . . . . . . . . . . . . . | . . . 00 |

23. Next, I'm going to describe a number of job characteristics. Please tell me if you are (were) very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with the following aspects of your current job (the job you had the last time we spoke)? . . . . . . . . . .

INTERVIEWER NOTE: ROTATE ORDER, START AT RED STAR *

| | VS | SS | SD | VD | DK | NA | INAP |
|---|---|---|---|---|---|---|---|
| a. How satisfied are (were) you with the job security of your current job (the job you had the last time we spoke)? Would you say are (were) very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied? . . . . . . . . . . . . . . . . . . . . | 1 | 2 | 3 | 4 | 8 | 9 | 0 |
| b. . . . with how interesting your work is (was) to you? . . . . . . . . . . . . . . . . . . . . . . . . | 1 | 2 | 3 | 4 | 8 | 9 | 0 |
| c. . . . with the opportunities to learn new things? . | 1 | 2 | 3 | 4 | 8 | 9 | 0 |
| d. How satisfied are (were) you with the wages you are (were) earning? Would you say that you are (were) very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied? . . . . . . . . . | 1 | 2 | 3 | 4 | 8 | 9 | 0 |
| e. . . . with the chances to make independent decisions— . . . ? . . . . . . . . . . . . . . . . . | 1 | 2 | 3 | 4 | 8 | 9 | 0 |
| f. How satisfied are (were) you with your relationships with your co-workers? . . . . . . . . . . . . . . . . | 1 | 2 | 3 | 4 | 8 | 9 | 0 |

| | VS | SS | SD | VD | DK | NA | INAP |
|---|---|---|---|---|---|---|---|
| g. How satisfied are (were) you with the sense of accomplishment you get (got) from your job? . . . . | 1 | 2 | 3 | 4 | 8 | 9 | 0 |
| h. . . . with the chance to use skills developed during previous jobs? . . . . . . . . . . . . . . . . . . . . | 1 | 2 | 3 | 4 | 8 | 9 | 0 |
| i. How satisfied are (were) you with the distance between where you live(ed) and where you work(ed)? . | 1 | 2 | 3 | 4 | 8 | 9 | 0 |
| j. How satisfied are (were) you with your immediate supervisor? Would you say that you are (were) very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied? . . . . . . . . . | 1 | 2 | 3 | 4 | 8 | 9 | 0 |
| k. . . . with the opportunities for promotion or advancement? . . . . . . . . . . . . . . . . . . . . | 1 | 2 | 3 | 4 | 8 | 9 | 0 |
| l. . . . with the review procedures or evaluations? . . | 1 | 2 | 3 | 4 | 8 | 9 | 0 |
| m. How satisfied are (were) you with the company or organization that you work(ed) for? Would you say you are (were) very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied? . . . | 1 | 2 | 3 | 4 | 8 | 9 | 0 |

24a. Do (Did) you have medical insurance where you work(ed)?

| | | |
|---|---|---|
| YES . . . . . . . . . . . . . . . . | . . 1 | |
| NO . . . . . . . . . . . . . . . . | . . 5 | GO TO Q25a |
| DK . . . . . . . . . . . . . . . . | . . 8 | |
| NA . . . . . . . . . . . . . . . . | . . 9 | |
| INAP . . . . . . . . . . . . . . . | . . 0 | |

24b. How satisfied are (were) you with the medical insurance that you have (had)? Would you say you are (were) very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied?

| | |
|---|---|
| VERY SATISFIED . . . . . . . . . . | . . . . . 1 |
| SOMEWHAT SATISFIED . . . . . . . | . . . . . 2 |
| SOMEWHAT DISSATISFIED . . . . . | . . . . . 3 |
| VERY DISSATISFIED . . . . . . . | . . . . . 4 |
| DK . . . . . . . . . . . . . . . | . . . . . 8 |
| NA . . . . . . . . . . . . . . . | . . . . . 9 |
| INAP . . . . . . . . . . . . . . | . . . . . 0 |

25a. Do (Did) you have fringe benefits where you work(ed)?

| | | |
|---|---|---|
| YES . . . . . . . . . . . . . . . . | . . 1 | |
| NO . . . . . . . . . . . . . . . . | . . 5 | GO TO Q26a, p10 |
| DK . . . . . . . . . . . . . . . . | . . 8 | |
| NA . . . . . . . . . . . . . . . . | . . 9 | |
| INAP . . . . . . . . . . . . . . . | . . 0 | |

25b. How satisfied are (were) you with the fringe benefits that you have (had)? Would you say you are (were) very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied?

| | |
|---|---|
| VERY SATISFIED | 1 |
| SOMEWHAT SATISFIED | 2 |
| SOMEWHAT DISSATISFIED | 3 |
| VERY DISSATISFIED | 4 |
| DK | 8 |
| NA | 9 |
| INAP | 0 |

26a. Do (Did) you have flexibility in your work schedule at your current job (the job you had the last time we spoke)?

| | | |
|---|---|---|
| YES | 1 | |
| NO | 5 | GO TO Q27 |
| DK | 8 | |
| NA | 9 | |
| INAP | 0 | |

26b. How satisfied are (were) you with the flexibility in your work schedule? Would you say you are (were) very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied?

| | |
|---|---|
| VERY SATISFIED | 1 |
| SOMEWHAT SATISFIED | 2 |
| SOMEWHAT DISSATISFIED | 3 |
| VERY DISSATISFIED | 4 |
| DK | 8 |
| NA | 9 |
| INAP | 0 |

27. How close is (was) the job you have now (had) to what you were looking for--is (was) it exactly the same, almost the same, somewhat different, very different, or completely different?

| | |
|---|---|
| EXACTLY THE SAME | 1 |
| ALMOST THE SAME | 2 |
| SOMEWHAT DIFFERENT | 3 |
| VERY DIFFERENT | 4 |
| COMPLETELY DIFFERENT | 5 |
| DK | 8 |
| NA | 9 |

28. How satisfied are you with your life—would you say you are *very* satisfied, *somewhat* satisfied, *somewhat* dissatisfied or *very* dissatisfied?

| | |
|---|---|
| VERY SATISFIED . . . . . . . . . . | . . . 1 |
| SOMEWHAT SATISFIED . . . . . . . . | . . . 2 |
| SOMEWHAT DISSATISFIED . . . . . . | . . . 3 |
| VERY DISSATISFIED . . . . . . . . | . . . 4 |
| DK . . . . . . . . . . . . . . . . | . . . 8 |
| NA . . . . . . . . . . . . . . . . | . . . 9 |

29. In general, how much *satisfaction* in your life would you say comes (came) from *working* at your present job (the job you had the last time we spoke)—would you say *no* satisfaction, *just a little* satisfaction, *some* satisfaction *quite a bit* of satisfaction, or a *great deal* of satisfaction?

| | |
|---|---|
| NO SATISFACTION . . . . . . . . . . | . . . 1 |
| JUST A LITTLE SATISFACTION . . . | . . . 2 |
| SOME SATISFACTION . . . . . . . . . | . . . 3 |
| QUITE A BIT OF SATISFACTION . . . | . . . 4 |
| A GREAT DEAL OF SATISFACTION . . | . . . 5 |
| DK . . . . . . . . . . . . . . . . | . . . 8 |
| NA . . . . . . . . . . . . . . . . | . . . 9 |

30. You've succeeded at this: Is there any advice you'd like to give us to help others like yourself?

______________________________________________ __ __

______________________________________________

______________________________________________

______________________________________________

| | |
|---|---|
| NO RESPONSE GIVEN . . . . . . . . . . . | . . . 96 |
| DK . . . . . . . . . . . . . . . . . . . | . . . 98 |
| NA . . . . . . . . . . . . . . . . . . . | . . . 99 |

Thank you very much for your time. Your answers have been very helpful.

ENTER TIME NOW: ____________

*DO NOT FORGET TO ENTER INTERVIEWER RECORD*

INTERVIEWER/EDITOR RECORD: ( - ) R.ID

SEX OF RESPONDENT: MALE . . . . . . . . . . . . . . . . . . . 1
FEMALE . . . . . . . . . . . . . . . . . . 5

INTERVIEWER #: . . . . . . . . . . . . . . . . . . . . . . . ( - )

DATE OF COMPLETION: . . . . . . . . . . . . . . . . . . . . __/__/__ ( - )

TELEPHONE EXCHANGE: . . . . . . . . . . . . . . . . . . . . ( - )

REFERRAL SOURCE: . . . . . . . . . . . . . . . . . . . . . . __ __ __ ( - )

GEOCODE: . . . . . . . . . . . . . . . . . . . . . . . . . . . __ __ __ __ __ ( — )

CODER #: . . . . . . . . . . . . . . . . . . . . . . . . . . . __ ( )

## APPENDIX 4

## T1 and T2 Instrument and
## Interviewer Instructions

# OLDER WORKER PROJECT

# INSTRUMENT AND INTERVIEWER INSTRUCTIONS

March 1988

HUMAN SERVICES DEVELOPMENT INSTITUTE
PUBLIC POLICY AND MANAGEMENT PROGRAM
UNIVERSITY OF SOUTHERN MAINE

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## I. DESCRIPTION OF HSDI

The Human Services Development Institute (HSDI), part of the University of Southern Maine's Public Policy and Management Program, is the largest of the University's research institutes. Created in 1972 to help government and private agencies improve health and human services, HSDI has performed numerous research, technical assistance and training projects in the fields of health care, child welfare, social services, aging, substance abuse, mental health and developmental disabilities. HSDI retains thirty-five full-time professionals and is composed of four units: Child and Family Policy; Health Policy; Aging Research and Policy; and Rehabilitation and Special Education. The Institute also houses a Research Support Lab which provides a full range of research support services. Since the Older Worker Project is under the auspices of the Aging Research and Policy Unit, the following is a brief description of the unit.

### Aging Research and Policy Unit

The Aging Research and Policy Unit conducts projects related to the impact of an aging population on public and private services, including health, housing, employment, education, and law. Unit staff work with state and local providers of services to older persons in order to evaluate the effectiveness of programs and policies. Research has included a study of hospital-based home care planning for hospitalized older persons; a study of innovative nursing home programs; research on skilled nursing and home health services in Maine, and special services for Alzheimer's Disease patients and their families.

## II. INTERVIEWER OBLIGATIONS

The only acceptable role for an interviewer is that of a professional researcher. To depart from this role may introduce bias and compromise research objectives. In no case is an interviewer to attempt to counsel a respondent or sell any goods or services to a respondent or enter into any but a professional relationship with a respondent. If asked for help by a respondent, interviewers must limit themselves to providing the names of regular, recognized agencies and are to do this only when such information or help is specifically requested by the respondent. By the same token, no interviewer should ever ask for advice or counseling from a respondent or in any way exploit the research situation for personal advantage.

The careful respondent protection procedures observed by the Human Services Development Institute will be undermined if interviewers do not maintain professional ethical standards of confidentiality regarding what they learn from or about respondents. All information obtained during the course of the research that concerns respondents, their families, or the organizations they represent is privileged information, whether it relates to the interview itself or is extraneous information learned by interviewers during the performance of their work.

## III. COVER SHEET AND DESCRIPTION

The cover sheet contains the contact record. It is important that everything written on the interview schedule as well as the entire instrument be legible, including the call record. Every contact made with the respondent must be recorded. Write in your interviewer number, the day of the week, the date, the time of the contact, and the disposition (the outcome of the contact), and the call number. All of the older worker referrals should have specified the best time to call them. Whenever possible we will try to call at this time.

Call numbers are:

Call No.

1. Monday-Friday between 5:30 and 7:30 p.m.
2. Monday-Friday between 7:31 and 9:30 p.m.
3. Saturday (9:30 a.m.-9:30 p.m.) or Sunday (1:30-5:30 p.m.)
4. Monday-Friday before 5:30 p.m.
5. Sunday (5:31-9:30 p.m.)
6. One other call at any time at least four days after the first call. The second one of any of these call #'s at least four days after first call.

Possible dispositions are:

| | |
|---|---|
| NA: | No answer. |
| Busy: | If you get a busy signal, try the number again in about a half hour. |
| NIS: | Not in service. This disposition is to be used when you get a recording that the number is not in service or has been changed. |
| Refusal: | There may be a few people who may refuse to be interviewed. Should this occur, it is important to emphasize the importance of the study to the potential respondent and convert the refusal. |
| Termination: | The disposition is a termination if the respondent begins the interview and then terminates before finishing. This is very rare. Always offer to call at a more convenient time as many respondents refuse or terminate because you have called at a bad time. |

Ineligible: Referrals who have started a job prior to January 1, 1988 or who have never actually started their job will not be interviewed. However, respondents who have started a job after January 1, 1988 and left prior to the time of the interview will be interviewed.

CB: Call back. When you arrange with a respondent to call back at a better time, enter the disposition as CB and when you should call back, i.e., CB 8:00 p.m., 11/27. Include the name of the person you or another interviewer should ask for and verify the phone number. CB should not be used if you expect a refusal. When this is the case, please, so note.

C: Completion, a completed interview. An interview is complete only if all applicable sections of the interview are complete.

## IV. USE OF THE INTERVIEW SCHEDULE

1. *Always Use a Soft Lead Pencil to Record Responses When You Are Interviewing*.

2. *Abbreviations Used in the Instrument:*

   a. The abbreviation *DK* is used for *Don't Know* responses. Circle the DK response on any question when R responds that she/he doesn't know. Often, respondents say "I don't know" when they are really thinking about a response. A don't know response must be probed unless otherwise indicated in the Q by Q's. An expectant pause on your part can be very effective when handling these kinds of DKs.

   b. When *R refuses* to answer a question, or the interviewer *inadvertantly* skipped a question which R should have answered, the abbreviation *NA* (not ascertained) is used. Circle NA on any question which R should have answered but didn't. When you edit the instrument, you must describe in the left margin of the interview schedule the circumstances surrounding the refusal. Most of these refusals can be converted by giving the respondent a general explanation of the purpose of the question. Do *not* use NA for questions which were inappropriate to R and were therefore not asked; the latter are coded *INAP* (see below).

c. An "inappropriate" question (INAP) is any question which the interviewer is instructed not to ask of certain respondents.

EXAMPLE:

20. Have you ever done volunteer or unpaid service work?

| | | |
|---|---|---|
| YES . . . . . . . . . . . . . . . . | . . 1 | |
| NO . . . . . . . . . . . . . . . . | . . 5 | GO TO Q23, p.9 |
| DK . . . . . . . . . . . . . . . . | . . 8 | |
| NA . . . . . . . . . . . . . . . . | . . 9 | |

INTERVIEWER NOTE: IF R HAS DONE VOLUNTEER WORK, ASK Q20a-Q22

20a. In total, how many years have you done volunteer or unpaid service work?

| | | |
|---|---|---|
| NUMBER OF YEARS: ______________ | (72 -- 73) | |
| DK . . . . . . . . . . . . . . . . | . . 98 | GO TO Q23, p.9 |
| NA . . . . . . . . . . . . . . . . | . . 99 | |
| INAP (CODED 5, 8, or 9 in Q20) . | . . 00 | |

COLUMNS

| 21a. What kind of organization or association was that volunteer work with? | 22a. What type of work did you do? | | |
|---|---|---|---|
| ______________________ | ______________________ | (74 - 75) | (80 - 81) |
| ______________________ | ______________________ | | |
| DK | DK . . . . . . . . . . . . | . . 98 | . . 98 |
| NA | NA . . . . . . . . . . . . | . . 99 | . . 99 |
| INAP(CODED 5, 8 or 9 in Q20) | INAP(CODED 5, 8 or 9 in Q20) | . . 00 | . . 00 |

CODES

In this example, interviewers do not ask Q20a, Q21a and Q22a of respondents who are coded 5, 8, or 9 corresponding with NO, DK, or NA in Q20. The interviewer does not mark any response to an "inappropriate" question. Notice that skip instructions will always be near your recorded response, in the right hand margin, beneath an open-ended question, or boxed in an interviewer note located to the left or below the question. If the next appropriate question is on a subsequent page, the page number will be specified in the instruction.

3. Also notice from the example above that this interview schedule is set up so that coding and keypunching can be done from the same form. The numbers in parentheses are column numbers that correspond to numbers in a computer file. The numbers that you circle are the possible codes for that column or columns.

   Most responses can be recorded in the right hand margin by circling a number or entering a numerical response. If the response is numerical, be sure to enter leading zeros when necessary to fill the space provided.

   Responses to open-ended questions should be clearly written (verbatim). Usually two or three lines are provided for such a response.

4. Carefully follow instructions about when to read the response choices to R and when not to. Generally you read only what is in the question itself, not responses listed below the question. Once in a while, however, there are directions to the contrary. Interviewer instructions are all in CAPITAL LETTERS, so any material all in capitals is not read to the respondent. If something is not all capitalized but is in parentheses, it is an optional explanation or probe. Read this to R when an explanation is needed.

## V. TELEPHONE SURVEY INTERVIEWERS

Interviewer numbers have been assigned as follows:

1. Kari Koss
2. Cara Barter
3. Al Leighton
4. Denise Blomquist
5. Peter Weigel

## VI. QUESTION BY QUESTION OBJECTIVES

### PURPOSE OF STUDY

The purpose of this research is to investigate the meaning of job success among older workers (age 55 or over) in new jobs. It will examine factors related to successful job placement among older workers. Given the steadily increasing numbers of older persons who will be searching for new jobs in later life, this research will provide a clearer understanding of successful work and successful job placement from the perspective of the older worker.

The major research questions addressed in this study are:

1. What constitutes job success from the perspective of the newly hired older worker?

2. How do older workers' definitions of a successful job vary according to demographic and socioeconomic characteristics and prior work history?

3. What job characteristics are related to successful and unsuccessful job placements among older workers?

4. How do older worker and job characteristics interact to shape successful and unsuccessful placements?

SCREENING:

We are talking to people at their home telephone or possibly their place of employment. All of these potential respondents have been referred to us by an organization related to the respondent's employment. We will be speaking with people who have started a job as far back as January 1, 1988. People who have left their job during the period from January 1st until the date of the interview will also be interviewed. The questions will be slightly modified as appropriate to fit this situation.

People who never actually started the job or who started prior to January 1, 1988 will not be interviewed. They are counted as ineligible.

If a respondent asks for a telephone number or a person to contact regarding the survey, you may give this number--(207) 780-4430--to speak to Richard H. Fortinsky, Project Director, Human Services Development Institute, University of Southern Maine, 96 Falmouth Street, Portland, Maine; or Steve Norland, Director, Institute for Social Research, University of Hartford, 200 Bloomfield Avenue, West Hartford, Connecticut, (203) 243-4322.

## COMMITMENT STATEMENT:

Studies about interviewing have shown that a respondent commitment procedure leads to improved respondent performance when answering questions. It is important to get each respondent committed to the interview. Please bear in mind, however, that for this to work, you need to be sincere in your delivery of this message for each and every respondent. Do not expect respondent commitment if the R's cannot tell by your performance that this is a very worthwhile use of their time.

The Statement of Commitment and Confidentiality must be read before the interview begins.

## QUESTION BY QUESTION OBJECTIVES

Q1. The purpose of this question is to elicit the value of work for the respondent other than money. But be sure R is talking about paid employment and not volunteer work, a hobby, or some other activity.

Q2. Be sure, once again, that the R is talking about paid work.

Q3. This question, which has several parts, refers to work in general and not the specific job R has just taken. All sub-parts of these questions will elicit responses on the same scale: very important, somewhat important, not very important, or not at all important.

Do not define job security for R. Do not define good wages for R. Each of these items describing characteristics of work lend themselves to personal and subjective meanings. If R asks you, "What do you mean by 'flexibility' or 'opportunities for promotion or advancement'?" ask them to define these items in their own terms.

In this final part of Q3, we are seeking additional responses not previously mentioned in the list. R may give you a factor or characteristic which resembles one of the factors you have just read. If the exact words are used (i.e., "good fringe benefits"), ask R to explain the factor a little further. If R gives you a factor which is close to but not exactly repetitive of one of those you have just read, write it down anyway.

Q4. Here we are looking for an exact month and day.

Q5. The next set of questions refers to the new job that R has just taken (on the date given in Q4). Write down the first reason R gives you on the first two blank spaces. If R goes on to talk about other reasons for seeking work, write them down under "Were there any other reasons?" If R stops after giving one reason, probe with "Were there any other reasons?"

Q6. Write down the first reason given in the first two lines. Probe with "Was there any other reason?" if R stops at one reason.

Q6a. This question is only to be asked of a respondent who started the job listed by the referring agency after January 1, 1988 but left prior to the date of the interview. Make sure to ask if there were any other reasons and to continue with the interview.

Q7. The purpose of this question is to match up the job R has actually taken with what she/he had sought.

Q8-9c. In response to the questions concerning job and the type of business or industry that the job is in, it is necessary to get very exact information about the job and about the business in which R is employed. It is usually necessary to write several words to describe an occupation or an industry. Be as specific as possible. Ask the respondent for more information if you need it.

If a person has had more than one job or type of work or employer, record information for R's "usual" job.

Although the format for these questions on Occupation and Industry is the standard format found in most SRC questionnaires, the questions were rewritten (1981) to include automatic probes and to try to help the respondent and the interviewer arrive at the clearest, most codeable description of R's occupation and that occupation's industry code.

In order to code an industry or occupation accurately, we must have very detailed information about the nature of the business of a person's employer and the type of work in which the person is engaged. To obtain this information, you will often have to use very specific probes. For example, if R responds to the "tell more . . . " question with "I run a machine." you should ask, "What kind of machine is that?" If R says "construction worker," a good probe would be "What are the main duties on your job?" If R just gives duties or responsibilities, probe for job title. If the response to the industry question is "We make machinery," a good probe would be "What kind of machinery do you make?" or "What kind of machinery is that?" Because we must use nonstandard probes to get the level of detail that we need, this section is an exception to the rule that you should write out any nonstandard probes that you use. To indicate that you have probed for more specific information on R's industry type, put PI in parentheses (PI).

R may tell you the name of the company for which he or she works; do not record names of businesses or companies in the questionnaire! Not only is this possibly identifying information and therefore a breach of confidentiality, but names are not sufficient for coding. Agencies where R has volunteered are an exception to this.

We are interested in the job on which R spends or has spent the most time, or (if R spends an equal amount of time on two jobs) ask about the one from which the most money is earned. Since very specific information is needed to code R's occupation accurately, we encourage you to observe the following instructions carefully:

1. Probe for clear, complete answers. We must be able to distinguish among unskilled workers (such as laborers), semi-skilled workers (such as operators), and skilled workers (such as plumbers or electricians).

2. The type of place at which R works is (usually) an insufficient response to occupation questions. For example, if R "works in a bank," he might be a manager, a teller, or a janitor!

3. Avoid vague job titles that may apply to a wide range of occupations. for example, if R says he is "an engineer," that may mean that he: (a) designs bridges or airplanes; (b) operates a railroad locomotive; (c) tends an engine in a power plant; or (d) shovels coal into a furnace. An R who says he is "a road construction worker" may be: (a) the supervisor of a road gang (foreman); (b) the operator of a bulldozer (craftsman); or (c) a common laborer. We need more specific information than "engineer" or "road construction worker" to make the necessary distinction between skilled, semi-skilled, and unskilled occupations.

4. Examples of differentiations necessary at the other end of the occupational scale are: (a) whether a "nurse" is a registered nurse (RN) or a licensed practical nurse (LPN) and (b) whether a "teacher" is at the college, high school, or elementary school level. Some suggested probes to determine this are: "At what level do you teach?" or "What type of school or college do you teach in?"

5. The following job titles are unacceptable without further explanation. They simply do not provide enough information for us to determine accurately R's occupation: "factory worker," "construction worker," "driver" (of what?), "teacher" (what kind of school? grade?), "engineer" (what does he or she do on the job?), "nurse" (RN? LPN?), "sailor" (officer, enlisted person, deckhand, or what?), "manager" or "supervisor" (whom does he or she supervise?), "salesperson" (what does R sell?

wholesale or retail?), "clerk" (what does R do on the job?), "mechanic" or "repairperson" (what does R repair?), "apprentice" (plumber, electrician, or what?), and "inspector" (what does R inspect?).

The type of business or industry in which R works is vital, not only to classify the industry, but to help us code occupation. For instance, a laborer or a warehouse worker may do different kinds of things, depending on the industry in which he or she works. We need to know: (a) whether it is a manufacturing or a selling enterprise; (b) what kind of product/service is manufactured/provided; and (c) for a business that sells things, whether it sells wholesale or retail. If R is a salesperson, find out whether he or she is engaged in wholesale or retail trade and what he or she sells.

R may include here jobs other than the main job--but remember we are interested in the main job only.

The following clues will help you know what kinds of probes to use to get codeable information about occupation and industry.

1. When something is constructed, is it: buildings? bridges? highways? etc.
2. Utilities: electric light and power? water? electric-gas? gas and steam? telephone?
3. If the respondent is employed by the government, specify the department: Parks and Recreation, Sanitation, Bureau of Land Management, Department of Labor, etc.
4. Government level: federal? state? local?
5. Medical clinics: hospital clinic? private doctor's clinic?
6. Nurses: RN? LPN?

7. If a person operates a machine, please specify the kind of machine.

8. "Machinist" is a specialized occupation and is not the same as a machine operator. Be aware of this, as many people use the terms interchangeably.

9. School level: specify grade for elementary and secondary teachers and subject if college level.

10. School type: vocational? high school? college?

11. Organizations: profit? nonprofit?

12. Processes used to make metal products: cast? stamped metal? fabricated? etc.

13. Foundries (material produced): brass? bronze? steel? iron?

14. Canneries: specify the kind of food that is canned: fish? fruit? milk? etc.

15. Babysitter: is the babysitting done in the respondent's own hoom or in someone else's home?

16. Engines: diesel? steam? turbine? etc.

17. Motors: aircraft? electric? outboard? rocket? etc.

18. Textiles: yarn? fabric? finished garments?

19. Clothing manufacturer: knit? cotton? wool? silk? etc.

20. Shoes: leather? canvas? orthopedic? rubber soled? novelty? etc.

21. When occupation is an armed forces occupation, try to get R's rank. If this is not possible, please try to find out whether the person is or was commissioned, non-commissioned, or enlisted. Keep in mind that civilians are also employed by the armed forces.

22. Mining: mining materials can be categorized as metal, coal, crude petroleum, or natural gas. Please ask the type of material mined: copper ore? borax? aluminum? gravel? crude oil? tin? petroleum? natural gas? etc.

23. Oil: there are many types of oil industries. Ask R to specify the type of oil business: oil field company (extraction)? oil lease buyers? oil distributor? oil station (retail): oil royalty dealer? oil storage tanks? etc.

24. Heavy equipment or heavy machinery: farm? construction?

25. Engineer: chemical? civil? industrial? petroleum? electrical? locomotive? etc.

26. Restaurant: chain? in a hotel? in a country club? in a nonprofit organization? etc.

27. If occupation is *manager* or *supervisor*, ask what the job duties are of the people R supervises or manages: sales? data processing? etc.

* * *

Q9d. If work hours vary from week to week, accept R's estimate. Be sure R knows you are seeking an *average* length of work-week.

Q10. The purpose of this question is to elicit R's early general impression of her/his new job. Read the response categories to R. If R wants you to clarify the meaning of "satisfied," say "whatever it means to you."

Q10a. Write down the first reason given by R about level of satisfaction with the present job. Please be clear. "Money" is not a clear response. "Because I am making better money than I thought I would" offers a clearer explanation.

Q11. This question refers to the job R had *prior to their new job*. Ask for a specific month and year. If R is not able to remember precise dates, accept an estimate.

Q12. See Q8-9c. This item refers to R's major career line of work. If R has had a series of very different jobs, ask for her/his impression of the major career thread or line. If R is unable to give a single response, write down the multiple job lines she/he has had. Once again this question refers to work for pay. As much as possible try to get a single primary job/career whenever possible.

Q13. This item is a probe of the above question in order to elicit more detail about R's main line of work throughout her/his career.

Q14. Be as specific as possible.

Q15. Once again, try to get R to be specific about what was made or produced in her/his main line of career work.

Q16. Try to get R to be exact. But do not spend more than a few moments trying to elicit an exact response. Mark DK if R says she/he doesn't know how many years they worked in their main career or if they seem to be seriously fumbling for a response. Some might say "about 25 years . . . " Accept such an estimate. With those persons who have never worked for pay up until now, mark INAP.

Q17. We are seeking the primary reason R left her/his major career line of work.

Q18. We are still talking about R's main career line with this item. Repeat the response categories two or three times until you know R has a good sense of how she/he is being asked to respond. Once again, if there is a question about the exact meaning of an item, ask R to interpret the language in her/his own terms while answering the question.

Q19. Ask only of R's who have never worked. Make sure to specify an other response and that such response is reasonable.

Q20. This item refers to volunteer or work not-for-pay only. With people with a speckled volunteer history, it may be hard to determine an exact number of years. Accept a good-faith estimate.

Q21a-21c. This item requests the nature of the organization or association in which R has volunteered. There is a possibility for multiple responses. If R says "The YWCA and the Lions Club." write down "YWCA" in 21a and "Lions Club" in 21b. We have allowed for up to three types of organizations. Do not request that R list more than that. Probe if R gives you a non-specific response such as "non-profit association" or "youth organization" as a response. We are looking for the specific name of an agency if this is the clearest way of defining the organization. If the response is clear without an exact association or organization name that is acceptable.

Q22a-22c. After each response to 21a, ask R what type of work she/he actually did for the YWCA, the Lions Club, etc. The response to 22a will correlate with 21a; 22b with 21b, etc. Try to get R to be as specific as possible with what type of work she/he performed in these volunteer roles. We are looking for functions and specific activities and not just broad operations such as "staff," "helper," etc.

Q23. Household Census: Record the persons in the household from oldest to youngest, their age, their relationship to the respondent. Circle the respondent's Person Number in Column One.

Special Circumstances: College Students. Count as a member of the parents' household a student who is away at college or boarding school and lives in a dormitory, fraternity, or sorority house, because those persons would have no chance to be interviewed at those locations. Students who live in an apartment at college are not counted as a part of their parents' household, because they would have their chance of being interviewed at their apartment (where their apartment mates would be considered unrelated members of a household).

Persons in Military Service: Do not count as a member of the parents' household a child who is away in the military service. (Persons in the military service who are reached at their homes where they are stationed are eligible to be interviewed, assuming they meet other eligibility criteria).

Roommates: Roommates in apartments and houses are listed as household members, with "Not Related," Code 8, recorded as the relationship to respondent.

Patients in Hospitals and Nursing Homes: Patients in hospitals and nursing homes are listed as members of the households from which they are absent.

In General: When in doubt, include persons and ask about their age, sex and relationship to R rather than exclude them. Make careful and complete notes at the bottom of the grid concerning the circumstances.

Q24. This question means health in general and includes both physical and emotional, meaning mental and psychological health. The R should compare her/himself with other people her/his own age.

Q25. Ask about a specific health-related problem which limits the type and/or amount of work the R can do. Specifics are very important here.

Q26. The specific problem is sought. Please be as clear as possible with actual diseases or conditions named as appropriate. Once again, always probe when the R does not give enough detail. Be as clear as possible. Record main health problem. Make notes if there are more than one.

Q27. Refers to overall quality of life. It is whatever satisfaction means to the R. Do not define it.

Q28. Relates to Q26 and refers to how much of the overall satisfaction with life comes from the job the R is presently working at. Again, do not define satisfaction.

Q29. Note the word "completed" in this question. If R did not complete eighth grade or was less than eighth grade circle this response. If eighth grade was the last complete year of school, circle this response. Ninth to eleventh grade should be circled as appropriate. Grade twelve will be circled for those R's who completed 12th grade and have a high school diploma or GED. Vocational or any non-college secondary training is for business, vocational or technical school attendees. One-to-three years of college will be the response for those who did not complete four years of college and did not graduate or have a two-year associate degree or certificate. Graduated from college is for four-year graduates with baccalaureate degrees and/or graduate degrees.

Q30. Get as exact a response as possible.

Q31. Do not read responses.

Q32. Make sure R names an actual town or township and not some other kind of place name.

Q32. Research has shown that different wordings of income questions produce widely differing results. The income question you will be asking produces an accurate answer without making R feel uncomfortable. If R does not want to give you income information, explain that the reason we ask for a general range of income from all our respondents is because research has shown that feelings of satisfaction in many areas, similarities of opinions, and other matters can often be related to range of income. Remind R that we do not want an exact amount, but just a general category for R and all of R's household for 1987.

PLEASE REMEMBER TO FILL IN THE INTERVIEWER RECORD

## VII. RULES FOR REASSIGNING TELEPHONE NUMBERS

Please notify the supervisor on duty, Kari or Beth-Ellen, if you are unable to complete an assigned older worker survey for any reason. Do not attempt to reassign these on your own.

The only time a survey will be reassigned is when a respondent refuses or possibly terminates or is ineligible. Random-digit dialing reassigning rules do not apply to this survey.

## VIII. SCHEDULING

You will be assigned to work on the Older Worker Surveys either as part of your regularly scheduled shift or on an as-needed basis at other times.

The desks at which you will be working are used by other people during the day. Please keep this in mind and leave the desk as you found it.

## IX. AFTER HOURS PHONE NUMBER

Should friends or family members need to reach you while you are working evenings and weekends, they can get through by calling: 780-4210. This number rings at Beth-Ellen's desk. Either a supervisor or someone else will answer.

Please try and keep personal calls, both incoming and outgoing, to a minimum.

# APPENDIX 4 - PART 2

# UNIVERSITY OF SOUTHERN MAINE

## OLDER WORKER PROJECT

## (FOLLOW-UP SURVEY T2)

## QUESTION-BY-QUESTION OBJECTIVES

FUNDED BY THE AARP/ANDRUS FOUNDATION

### INTRODUCTION

The follow-up survey will determine if respondents are still at the same job as when we first spoke with them, reasons for leaving their position if they are no longer at that job, how satisfied they are/were with that job overall and with specific aspects of it, and whether they agree or disagree with a list of statements about their job.

The survey will take 10-15 minutes to administer. It contains somewhat more difficult skip sequences than the first survey, especially through the first couple of pages, Questions 1-12. This is to help determine the respondent's current status--is he or she at the same company, in the same position; has he or she left that position at that company; is he or she looking for new work; and is he or she employed somewhere else doing the same or some other work. Please follow all directions carefully, fill in all blanks prior to starting the interview, and mark the interviewer checkpoints as appropriate. You might find it helpful to circle the directions for the skip patterns you are following on each survey.

## OLDER WORKER PROJECT FOLLOW-UP SURVEY (T2)
## QUESTION-BY-QUESTION OBJECTIVES

ASK ALL QUESTIONS ABOUT THE JOB THE RESPONDENT HELD WHEN WE FIRST INTERVIEWED HIM OR HER DURING THE INITIAL (T1) SURVEY. THE ONLY EXPEPTIONS TO THIS ARE Q7, Q8a, Q8b, Q9, Q10, Q11.

### SCREENING:

We will be calling back to speak with all of the respondents from the Initial (T1) survey. Whether these people are still at their jobs or not, we will interview them. It is extremely important that all of those respondents who were interviewed for the T1 survey be interviewed on the follow-up (T2) survey.

If someone has moved, please use the names and addresses on the last page of the T1 survey to try and get the R's new phone number. If you are unable to reach someone please make very clear notes on the coversheet about why this was and bring to the attention of a supervisor.

THERE SHOULD NOT BE ANY REFUSALS, as these people have all participated previously.

### COMMITMENT STATEMENT:

While a commitment procedure was used in the T1 survey it is absolutely essential that this be done again for each T2 survey.

Studies about interviewing have shown that a respondent commitment procedure leads to improved respondent performance when answering questions. It is important to get each respondent committed to the interview. Please bear in mind, however, that for this to work, you need to be sincere in your delivery of this message for each and every respondent. Do not expect respondent commitment if the R's cannot tell by your performance that this is a very worthwhile use of their time.

The Statement of Commitment and Confidentiality must be read before every interview begins.

QUESTION-BY-QUESTION OBJECTIVES

Q1 and 2. These two questions refer to work in general.

Q1. The purpose of this question is to elicit the value of work for the respondent other than money. But be sure R is talking about paid employment and not volunteer work, a hobby, or some other activity.

Q2. This question refers to whether R is with the same company, business, or organization as when s/he was last interviewed.

Q4. Is R still in the same position as when s/he was last interviewed? This question refers to exactly the same job at exactly the same company. If s/he is employed at the same job with a different company or a different job within the same company we want to know this.

It may seem redundant to ask this question of respondents who have left the organization, business, or company in Q3 but this serves as a double check.

If R is working at the exact same job in the same place skip to Q12, P5. Otherwise go through Q5-Q11 as appropriate.

Make sure to fill in the date R started his/her job from the T1 interview.

Q5. This is a list of reasons why R may have left his/her job. Ask for each item "a" through "i" making sure to circle an answer for each. Rotate order of the list, starting at the red star.

If R answers yes to Q5i make sure to ask the open-ended part of that question: "What was it that you didn't like about that job?"

Make sure to ask Q5j and if you get a "yes" response, ask Q5k.

Q6. After Q5 and before asking Q6 please look at the IWER CHECKPOINT for Q6. Mark the correct box--if one is reason given in Q5a-5j, then go to Q7 or if more than one reason is given in Q5a-j, ask Q6.

The purpose of Q6 is to find out the most important reason why R left his/her job. There is a place to put up to two reasons from the open-ended part of Q5j and k (not Qi, as your survey may state).

Q7. This question is to help us learn the current employment status of R's who are no longer employed at the job they had the first time we spoke with them. If R is not currently employed at a new job, skip to Q9, Pg. 5.

Q8a-b. WHILE IT IS IMPORTANT TO REMEMBER THAT MOST QUESTIONS ARE TO BE ASKED ABOUT THE JOB R HAD DURING THE TIME OF THE FIRST INTERVIEW, THIS IS ONE OF THE EXCEPTIONS.

In response to the questions concerning the most recent (or new) job and the type of business that job is in, it is necessary to get very exact information about the job and about the business in which R is employed. It is usually necessary to write several words to describe an occupation or an industry. BE AS SPECIFIC AS POSSIBLE. ASK THE RESPONDENT FOR MORE INFORMATION IF YOU NEED IT. If a person has more than one job or type of work or employer, record information for R's usual job.

The format for these questions on occupation is a standardized format which includes automatic probes and which were developed to try to help the interviewer and the respondent arrive at the clearest, most codeable description of R's occupation.

In order to code an occupation accurately we must have very detailed information about the type of work in which the person is engaged. To obtain this information, you will often have to use very specific probes. For example, if R responds to the "tell more . . ." question with "I run a machine." You should ask, "What kind of machine it that?" If R says "construction worker," a good probe would be "What are the main duties on your job?" If R just gives duties or responsibilities, probe for job title. If the response to the industry question is "We make machinery," a good probe would be "What kind of machinery do you make?" or "What kind of machinery is that?" Because we must use nonstandard probes to get the level of detail that we need, this section is an exception to the rule that you should write out any nonstandard probes that you use. To indicate that you have probed for more specific information on R's type of employment, put PO in parentheses (PO).

If R currently has more than one job, we are interested in the job on which R spends or has spent the most time, or (if R spends an equal amount of time on two jobs) ask about the one from which the most amount of money is earned. Since very specific information is needed to code R's occupation accurately, we encourage you to observe the following instructions carefully:

1. Probe for clear, complete answers. We must be able to distinguish among unskilled workers (such as laborers), semi-skilled workers (such as operators), and skilled workers (such as plumbers or electricians).

2. The type of place at which R works is (usually) an insufficient response to occupation questions. For example, if R "works in a bank," he might be a manager, a teller, or a janitor!

3. Avoid vague job titles that may apply to a wide range of occupations. For example, if R says s/he is "an engineer," that may mean that s/he: (a) designs bridges or airplanes; (b) operates a railroad locomotive; (c) tends an engine in a power plant; or (d) shovels coal into a furnace. An

R who says s/he is a "road construction worker" may be: (a) the supervisor of a road gang (foreman); (b) the operator of a bulldozer (craftsman); or (c) the common laborer. We need more specific information than "engineer" or "road construction worker" to make the necessary distinction between skilled, semi-skilled, and unskilled occupations.

4. Examples of differentiations necessary at the other end of the occupational scale are: (a) whether a "nurse" is a registered nurse (RN) or a licensed practical nurse (LPN) and (b) whether a "teacher" is at the college, high school, or elementary level. Some suggested probes to determine this are: "At what level do you teach?" or "What type of school or college do you teach in?"

5. The following job titles are unacceptable without further explanation. They simply do not provide enough information for us to determine accurately R's occupation: "factory worker," "construction worker," "driver" (of what?), "teacher" (what kind of school? grade?), "engineer" (what does s/he do on the job?), "nurse" (RN? LPN?), "sailor" (officer, enlisted person, deckhand, or what?), "manager" or "supervisor" (whom or what does s/he manage or supervise?), "salesperson" (what does R sell? wholesale or retail?), clerk (what does R do on the job?), "mechanic" or "repairperson" (what does R repair?), "apprentice" (plumber, electrician, or what?), and "inspector" (what does R inspect?).

Q9. If R has left T1 job and does not have new employment we would like to know if s/he is currently seeking a new job.

Q10. If R is seeking a new job we would like to know more about the kind of work s/he is looking for. Please be as accurate and detailed as possible so that this information may be coded.

Q11. This is a built-in probe for Q10 to be used as necessary.

Q12. This relates to Q16 in the T1 survey. Now that the R has been on the job for a longer time we would like to find out how satisfied s/he currently is with that job. We are looking for a general impression. If R wants you to clarify the meaning of "satisfied," say "whatever it means to you."

NOTE: If R is no longer working at the same job, Q12-Q27 should be read in past tense referring to the job we interviewed R on for the T1 survey.

Q13. Write down the first reason given by R about level of satisfaction with the present job. Please be clear. "Money" is not a clear response. "Because I am making better money than I thought I would" offers a clearer explanation.

Q14. This question helps to measure job satisfaction. Ask of all R's. Circle one answer.

Q15. Follow the correct skip sequence here.

Q16a. To be asked of R's who answered "yes" to Q15. Please be clear and get enough detail. "People" is not clear enough but "The people I work with are pleasant and helpful," is.

Q16b. To be asked of R's who answered "no" to Q15. Again, please be sure to get enough detail.

Q17. In the T1 survey we asked R's this question about their primary or main job. Now we would like to ask it about the job s/he had at the time of the T1 interview which may or may not be his or her current job. Repeat the response categories two or there times until you know R has a good sense of how s/he is being asked to respond. If there is a question about the exact meaning of an item, ask R to interpret the language in his/her own terms while answering the question. Using "whatever it means to you" is suggested in this case. ROTATE THIS QUESTION, STARTING AT THE RED STAR.

Q18. This could include paid and/or unpaid extra work time.

Q19. Again, this is left to R's interpretation.

Q20. In cases where R has more than one supervisor s/he should try to answer in terms of his/her most immediate supervisor.

Q21. Elicit an average number of hours. A RANGE IS UNACCEPTABLE.

Q22. Please be clear as to whether this is an hourly wage, weekly salary, etc. and code accordingly in Q22a.

Q23. This question, which has several parts, refers to the specific job R has and about which we interviewed R in the T1 survey. All sub-parts of this question will elicit responses on the same scale: very satisfied, somewhat satisfied, somewhat dissatisfied, and very dissatisfied. Do not define job security for R. Do not define independent decisions for R. Each of these items describing characteristics of work lend themselves to personal and subjective meanings. If R asks you, "What do you mean by 'opportunities to learn new things' or 'sense of accomplishment' ask them to define these items in their own terms (whatever it means to you). ROTATE THE ORDER STARTING AT THE RED STAR.

Q24a & 24b, Q25a & 25b, Q26a & 26b. In the first part of each of these questions we screen the R as to whether or not s/he has these things at his or her job. If s/he does we then ask the second part which is his or her level of satisfaction with that particular benefit or aspect of his or her job. Please be sure to follow the skips through these three questions correctly.

## OLDER WORKER PROJECT FOLLOW-UP SURVEY (T2)
## QUESTION-BY-QUESTION OBJECTIVES

Q27. Now that the R has been at the T1 job for a period of time, or was prior to leaving that position, we would like to know how the job compares with/compared with what they were looking for. Read the choices to the R carefully.

Q28. Refers to overall quality of life. It is whatever satisfaction means to the R. Do not define it.

Q29. Relates to Q28 and refers to how much of the overall satisfaction with life comes from the job the R is presently working at (or which s/he had at the time of the T1 interview.)

Q30. Here we solicit additional comments from the R. Please circle 'NO RESPONSE GIVEN' if the R has no comments to add.

Thank R. Enter time interview ends and fill out the Interviewer Record.

August 1988